CANADIAN ARTS CONSUMER PROFILE 1990-1991

FINDINGS

by

DECIMA RESEARCH

and

LES CONSULTANTS CULTUR'INC INC.

MAY 1992

Errata

On page 243, in the sentence "The issue of more choice over when and what to attend is one, and 40% of those responding to this question say this is a very important reason", *40%* should read *47%*

On page 244 , the table 4.19 should read as follows.

Table 4.19
AUDIENCE: IMPORTANCE OF REASONS FOR NO LONGER SUBSCRIBING

	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT TOO/ NOT AT ALL IMPORTANT	NO OPINION
Want more choice in what you attend and when	47	28	24	26
Cannot afford subscription	35	32	33	27
No longer have time	21	33	46	33
Don't want to go alone	17	22	61	36
Type of work company puts on is not of interest to you	11	25	64	40
Company's performances got repetitious	10	28	62	40
No longer enjoy this type of performance	7	22	71	40

* Percentages have been recalculated to exclude *no opinion* responses because of their large proportion.

DEDICATION

Over one thousand performing and visual artists, arts marketers, festival organizers, producers, presenters, galleries, artist-run centres and ordinary Canadians contributed to the making of the Canadian Arts Consumer Profile through their participation in discussion and focus groups, distribution of questionnaires, and testing of instruments and results. The Canadian Arts Consumer Profile is dedicated to all Canadian artists, their cultural sector colleagues, and the 52,000 Canadians who completed 65,000 questionnaires.

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EXECUTIVE SUMMARY & HIGHLIGHTS

INTRODUCTION

The Canadian Arts Consumer Profile constitutes the first pan-Canadian survey of current and potential consumers of the professional performing and visual arts. A project jointly funded by Communications Canada, the ministries responsible for culture in all ten provinces, and the cities of Montréal, Vancouver, and Toronto, the Canadian Arts Consumer Profile is intended to serve as a foundation for new marketing initiatives for the arts in Canada.

The governments involved formed a Management Committee with representatives from all fourteen financial partners to oversee the three/year project contracted to the team of Decima Research of Toronto and Les consultants Cultur'inc inc. of Montréal.

The publication of Findings, the first major report by the two research firms on the data collected, clearly indicates that there is major market penetration potential and significant market development potential for Canada's performing and visual arts. The result of analysis of 65,000 different questionnaires completed by 52,000 Canadians, Findings has been structured to not only summarize most of the data, but also to be used as a reference manual for Canadian arts marketers.

METHODOLOGY

The data were collected via three surveys of performing arts attenders, visual arts purchasers, and the Canadian general public, using six different questionnaires. A Performing Arts Short Questionnaire distributed by performing arts organizations and presenters on behalf of the project at 293 different performances, and a Festivals Short Questionnaire distributed by 58 different festival organizations, enabled the collection of information from audiences related to the performance attended. These short questionnaires also identified audience members interested in receiving a Performing Arts Long Questionnaire. This questionnaire probed attitudes and experience related to a range of issues dealing with attending performances. A Visual Arts Long Questionnaire was mailed to homes through commercial galleries, artist-run centres, and individual professional artists. These four questionnaires provide indications about behaviour and attitudes on the part of current consumers. A General Public Telephone Questionnaire, leading to a General Public Long Mail Questionnaire, both provide data about the reported behaviour and attitudes of all Canadians.

Data were collected according to two major parameters. Canada was segmented into eleven geographical zones which put Nova Scotia, Newfoundland, and Prince Edward Island into one zone, the seven other provinces into unique zones, and the three cities into zones separate from their provinces. As well, data were collected according to eighteen different performing arts types (ballet, contemporary dance, theatre:drama, etc.), festivals, and eight different visual arts points of sale (commercial galleries, artist-run centres, etc.).

RELIABILITY

The general public survey of the Canadian Arts Consumer Profile was based on a random sample and yielded an unweighted sample of 5,437 and a weighted national sample of 1,705. The confidence interval for a sample of this size is +/-2.4%, at the 95% level. In addition, the sample size in each zone is large enough for reliable analysis. Sample size for each zone varies, as does the confidence level (These can be found in the Methodological Appendix).

As well, the researchers have analysed the data with caution. For example, in questions that asked the respondent to agree strongly, somewhat or slightly, or disagree strongly, somewhat or slightly, the agree/disagree slightly have been merged to reflect an attitude of indecision. For example, while 91% of the Canadian general public agree with the statement that it is important to expose children to the arts, 72% hold this position definitively. Similarly, while 88.5% agree that artists make a major contribution to our society, 71% hold this position definitively. The application of such caution to interpretation of the data engenders the ability to use the results with authority.

CAVEAT

The performing and visual arts questionnaires were collected through chosen performances and via visual arts intermediaries, and provide interesting confirmation of the behaviour and attitudes of current consumers that could not have been gathered through usual polling techniques. Statistically, however, they do not represent the general population. The telephone and mail general public questionnaires were randomly sampled according to customary statistical research methods, and may be extrapolated to represent Canadians.

The reader of the Canadian Arts Consumer Profile Findings must therefore keep the three data sources in constant balance as the performing arts audience, the visual arts purchasers, and the general public were approached in three very distinct ways. Sociodemographic analysis of the results according to these three groups reveals many market segments and important targeting opportunities, as does the psychographic analysis of the general public.

CHAPTER ONE: The Making of the Canadian Arts Consumer Profile

"The Making of the Consumer Arts Profile," the first chapter in Findings, describes the genesis, intention, research design, and mandate of the Canadian Arts Consumer Profile, and an outline of the research results document. The performing arts have been grouped according to traditional types or disciplines (dance, theatre, classical music, opera, etc.), and popular types (rock, folk, musicals, etc.) Appendices provide more methodological details.

CHAPTER TWO: People and the Arts

"People and the Arts," the second chapter in Findings, opens with the basic models and context in which all subsequent analysis must be understood.

Leisure Time

Six out of ten Canadians say they have between 10 and 30 hours per week to spend on leisure activities, while 52% report that they are out of their homes at night for non-work related reasons at least three nights of the week. In all, over 85% of Canadians report having undertaken at lot of at-home activities over the past year, however, many also partake in activities outside of the home such as camping, attending amateur performances and biking recreationally, to name a few.

In terms of out-of-home leisure activities, most Canadians visit friends/relatives in their homes and shop/window shop for non-grocery/non-household items at least once per week, however, 67% report having attended a performance in an auditorium or hall at least once a year, while 51% have attended a museum or art gallery, and 67% have gone to a movie. The frequency with which people attend is also significant, and the data demonstrate that the

number-one cultural activity that people undertake one to four times a year is performance attendance, followed by visiting a library, and finally visiting a museum or art gallery. Analysis of the data by community size reveals that the larger the urban centre, with its increased availability of product, the greater the frequency of attendance or purchase, and the greater interest in further activity.

A remarkable 67% of Canadians state that they wish to go out more often, and from a list of thirteen choices, the number one choice cited by 66% of the general public was to attend a concert or performance in an auditorium or hall, followed at 62% by eating out at a restaurant. While 57% cited attending movies more often, 40% indicated they wished to attend a professional sports event more often. As well, 46% of the general public report having attended a traditional performance type in the last six months, while 55% attended a popular performing arts type.

Competition, Barriers and Motivation

Competition for the performing arts is twofold: first the at-home activities such as reading, listening to music, watching television entertaining, and gardening, and second, out-of-home activities such as camping, exercising, and so on.

Barriers to further attendance, however, are significant. Fully 73% of Canadians say their main reason for not going out more often is that it is too expensive, which is followed by being too busy at home (35%) or at work (28%), then by a complaint that the kinds of things they want to see are not available in their area (25%). Having conducted the data collection during a recession is likely to have influenced the price barrier by making it particularly strong.

Sociodemographics

Sociodemographic analysis of the current and recent audience for the performing arts reveals that while there is a broad representation of attendance across most demographic groups, those of higher income and education levels are likely to be more frequent attenders. As well, partners with children are less likely to afford the time or money to partake. Women are typically more often represented among the more recent and frequent attenders than men.

Similar analysis of the visual arts purchasers, grouped according to paintings, sculptures, drawings, prints, and textile arts, as well as crafts, reveals that 44% of Canadians have bought original visual arts pieces and 31% have bought one-of-a-kind crafts within the last five years. Unlike the performing arts, men and women are more equally represented among purchasers, but again those with

higher income and higher levels of education are more likely to be purchasers. Most acquisition appears to occur between the ages of 25 and 54.

Media Habits

A brief analysis of media habits indicates that 54% of Canadians read a daily newspaper five days a week, and that 59% of Canadians read all four weekends. Performing arts audiences read at slightly higher levels. A significant 65% of Canadians listen to the radio one to nineteen hours a week, while 56% watch television from 10 to 29 hours a week. In terms of the performing arts on television, interest in popular type performances is quite high, with close to 40% saying they watch this type of programming regularly.

Attitudes

A series of value statements describing attitudes towards the arts was also included in the long survey questionnaires, which resulted in positive feedback for the performing arts, visual arts and crafts, and museum communities. Fully 67% of Canadians report that they like to make an evening of going to a concert or theatre, and 90% want to go out for an evening to relax and be entertained. A significant 42% say they really enjoy going to museums and art galleries to look at the artwork, while 71% believe that museums and art galleries make a community a better place to live. A majority of 53% of Canadians feel that the arts in Canada are important because they help make us unique and different from other countries, while 71% agree that artists make a major contribution to our society. Finally, 76% agree that Canadian performers are as good as performers anywhere else in the world. However, not all statements provided as positive a view, for example, 30% of Canadians report they do not know what to say when they meet people who are artists.

Psychographics

Chapter Two also provides a new marketing tool for the performing and visual arts, namely, a psychographic analysis that allows the definition of eight types of current and potential consumers. Such psychographic segmentation permits better targeting of advertising messages. The <u>devoted</u> and <u>believer</u> segments, reasonably and consistently disposed toward the arts and fairly frequent attenders, make up 25% of the population. The <u>practitioners</u> and <u>conditionals</u>, 32% of the population, also have reasonably positive attitudes, appear to be more "mainstream" in their tastes, but do not attend as frequently. The <u>uncommitted</u> and <u>uninvolved</u>, also 32% of the population, are less positive in their attitudes, but do attend occasionally. The <u>carefree pop/rockers</u>, 6% of the

population, is made up largely of pop/rock fans, while the tuned out, again 6% of the population, display little or no interest in the arts and do not or rarely attend.

Variations in attitudes and attendance behaviour across the eight psychographic types allows for a better understanding of the current, near and far consumers of performing and visual arts, and informs the processes of market penetration, by which current attenders or purchasers are encouraged to be more active, and market development, by which infrequent or non-consumers can be persuaded to attend or purchase.

CHAPTER THREE: Performing Arts in Canada

Chapter Three explores three major aspects of the performing arts market: who lives in each of the eleven zones surveyed by the Canadian Arts Consumer Profile, what is available and perceived to be available, and how the general public and audiences are influenced by barriers and motivations relating to facilities and the distribution of the arts. Subsequently, each zone is analysed for unique characteristics with regards to psychographic profiles, product availability, perception of facilities, attending motivations and constraints, and pricing issues.

Availability and Attendance

Findings suggests that there are some significant zonal variations with regards to actual and perceived availability and actual attendance. People in the major urban centres are typically the most likely to say that performances of all types are frequently or occasionally available, particularly theatre, both drama and comedy. The strongest markets in terms of the general public's reported attendance at traditional performing arts types in the last six months are, in order Montréal, Toronto, Québec outside of Montréal, Vancouver, and Alberta. For the popular performing arts types, Toronto, Vancouver, Alberta, Saskatchewan and Montreal reported the most frequent attendance over a past six-month period. However, it must be noted that the lack of availability of certain types in certain zones constitutes a constraint to market development.

Facilities

A number of factors related to facilities appear to be "very" important for Canadians, and play a role in the decision to attend a performance. These factors were actually rated by the audiences surveyed.

The most important factors quoted by the general public as directly responsible for the attender's quality of experience and attendance decision are, in order of importance the view of the stage from a seat (74%), the quality of sound (69%) and the comfort of seating (49%). Parking, getting to the facility, and available beverage services are mentioned by 39%, 38% and 38% of attenders as also important in making a decision to attend.

Most of these factors, when assessed by the audience, fell far short of "excellent" when rated. The cleanliness of the hall received the most positive assessment from the audience as close to half (47%) rated it as excellent, however, from there the audience rated the view of the stage (41%), the quality of the sound (39%), and the comfort of the seating (23%) less often as excellent. Beverage services were rated last. It is interesting to note that the two ancillary sources of revenue, house programs and beverage services, were rated low. There could be, clearly, increased revenue potential as a result of improvements in both areas.

Motivations and Constraints

As an important reason for non-attendance, Canadians cited price, time and availability once again, however, in asking more detailed questions about future attendance intentions of both the general public and the audience, other factors come into play.

The point of origin of the company, being local, visiting national, or international, largely is of no importance, however, the number one factor influencing both the general public and the audience, among ten options, was the piece being performed at 82% for the general public and 91% for the audience. For the general public, other important factors were the price of tickets (75%), the reputation of the company or group (65%), the desire for an evening out (61%), and the facility in which the performance takes place (56%). For the audiences, other important factors were the company or group of performers (76%), the reputation of the company or group (75%), the price of tickets (75%), word of mouth (68%), specific performers in the production (67%), and the facility (56%).

Pricing Issues

The provision of actual dollar amounts that the general public and audiences are prepared to pay for specific performance types should provide guidance to the arts community. Obviously zonal variations are significant, and the highest dollar averages occur in the three cities of Montréal, Vancouver and Toronto. What is most significant, however, is that 73% of Canadians are willing to incur

an increase in price, whereas 27% are not, or do not have an opinion.

Childhood Experiences

Respondents from the general public were asked if they recalled attending theatre, dance, classical music and children's productions when they were under 16 years old. Theatre and children's performances were attended by a little more than half of all Canadians (57% and 52%), while dance (38%) and classical music (27%) were attended less often. Most people recalled their experience as enjoyable.

When confronted with declared and intended attendance for the traditional performing arts, however, there emerges a systematic correlation between not recalling attendance when young and current non-attendance, as well as lower interest.

CHAPTER FOUR: Performing Arts Products in Canada

Chapter Four analyses current attendance patterns by discipline and across performing arts types, preferences for future attendance, tastes and preferences in the enjoyment of various types of music, community size variations in attendance patterns by performing arts types, and psychographic variations by performance type. In addition, it details Canadian expectations of performances, performance scheduling, ticket purchasing behaviour and preferences for both single tickets and subscriptions, the utility of house programs and finally the unique characteristics for each of the eighteen types plus festivals.

Attendance Patterns

For most types of performances upwards of three quarters of the population report having never attended, except for theatre wherein 47% of Canadians report having seen comedies and 40% dramas. While the limited history of attendance over the last six-month period is clearly a challenge, many of those who report attending in the last five years remain part of the current audience. For most types of traditional performing arts products, a half or more of those who report attendance in the last five years say they have attended in the last six months. The most frequently attended popular performance types over the last six months are pop/rock (43%), musicals (34%), and comedy (34%).

While audiences are most loyal to the type of performance at which they were surveyed, they clearly believe in the diversity of performance experience, both in terms of their current and intended attendance. What is striking in an analysis of the near consumer for various performance types is the common desire to attend theatre on the part of both current audiences and the general public.

Music Listening, Theatre and Dance Interests

Both traditional and popular audiences indicate they like to listen a great deal to classical music. Traditional performance type audiences next prefer opera/choral music, followed by easy listening and jazz/blues. Popular performance type audiences prefer, after classical, rock, jazz/blues and pop music.

The general public indicates it enjoys theatre a great deal, followed by rock music, pop music, classical music, and country music.

Community Size Variations

There is little variation in reported attendance and interest in more frequent attendance between communities of 1 million or more and in those of 100,000 to just under 1 million. At the same time, in many instances reported attendance and interest in further attendance among those living in communities of 10,000 to 99,999 are quite similar to the larger urban centres. It is in smaller rural communities that reported attendance and interest are below other communities, though this may be due in large part to the non-availability of performances. However, even in smaller communities, a quarter of the population (24%) report attendance at a theatre to see a comedy. An even larger number (42%) say they would be interested in seeing this performance type more frequently. It is also clear that a number of disciplines based in larger metropolises have substantially larger audiences. For example, when community size is accommodated, 9% of the population report attending opera in the three major urban areas, and 18% report an interest in more frequent attendance.

Expectations of A Performance

In measuring expectations of a performance, audience respondents were asked to select their three most important from a list of expectations, while the general public were asked to identify their single most important expectation. The results demonstrate that there are overall two major expectations across audiences and the general public: that the performance allows problems to be forgotten and that it makes one feel good. In addition, for the general public, that the performance be entertaining is most

important (asked only of the general public). Audiences are distinct from the general public in the greater importance they give to the expectation that a performance have a strong emotional impact. The public are more likely than audiences to cite the expectation that a performance be about real people facing real life situations, while avant-garde theatre audiences are singular in their concern that their performance type be about social issues.

Scheduling of Performances

Quite distinctly, Canadians prefer performances to be scheduled on Friday and Saturday nights, with a curtain time between 7:00 and 8:00, or 2:00 for a Saturday matinee.

Ticket Purchasing

Just as Canadians appear to have very real preferences for attending a performance, so too do they have definite preferences about purchasing tickets. Overall 53% prefer to have their tickets at least several weeks before a performance.

For audiences the method preferred for purchasing tickets involves using the box office and either ordering tickets by phone (36%) or in person (40%), with a minority mentioning in-person at ticket agencies (15%). The situation is very different among the general public, where ticket agencies are cited as frequently as box offices as sources for tickets, while in-person ticket purchasing at both is cited more frequently than telephone. However, when both audiences and the general public were asked their preference for ticket purchasing, there appears to be increased demand for the use of the telephone.

Ticket purchasing issues range from a general consensus that box offices must take back tickets that are not going to be used, to support for two ideas that might enhance ticket purchase: the ability to earn "frequent attender" points toward free tickets, and the capacity to purchase tickets through automatic teller machines which show seating plans. There appeared to be general dissatisfaction among audiences and the public with policies that refuse to exchange tickets when performances could not be attended.

Ticket Prices

The Canadian general public and audiences appear both to be willing to support a $2.00 increase in single ticket prices (28%), as well as a 15% increase in subscription ticket prices (42%), although this varies to some extent by current levels of prices paid. However, these results must be treated with some caution,

particularly for the general public, given the strong perception of price as a barrier to attendance.

Subscription

A remarkable 67% of audiences report having been contacted regarding subscription, ranging from 35% of country music audiences to 85% of opera audiences. Although, 34% of audiences have never subscribed, this must be interpreted in the context of those performance types which do not or seldom offer subscription. The two main reasons why the audience reports no longer subscribing are that they want more choice in what will be attended and when (74% say important), and that they cannot afford subscription (72% say important).

Information Related Issues

Audiences and the general public use a wide variety of sources to find out about performances they are interested in attending. For both groups, word of mouth and daily newspaper advertising are consistently the most frequently cited sources. Fully 49% of audiences and 33% of the general public read the arts/entertainment section of their newspaper most days, while 34% and 36% respectively read on weekends. However, while reviews influence few audience members (12%) to make a decision to attend, they do influence 32% of the general public.

The House Program

Most members of the audience (91%) at performances of traditional performance types obtain a program, as do many at popular performing arts type performances (59%). Fully 60% report reading all the program, and 44% say its enhances greatly their enjoyment. Clearly there are advertising sales opportunities based on the results by individual discipline.

CHAPTER FIVE: Visual Arts and Crafts in Canada

Chapter Five is devoted to the visual arts and crafts, analysing the geographic availability of products, sociodemographic and psychographic variables for current purchasers, young people and the visual arts, interest in purchasing specific product types, variables according to types of points of sale, factors affecting sales, purchasing preferences and price, and customer satisfaction levels.

Geography and Product Availability

According to the inventory of dealers and artists used, the sale of visual arts is clearly an urban phenomenon. The majority of commercial galleries and auction houses are found in the three major cities, and are most strongly represented in the provinces with the largest urban concentrations, namely Alberta, Ontario and Quebec. Artist-run centres are more evenly distributed across the country, as are craft media galleries. As well, most purchasers appear to purchase works from artists and dealers within their zone of residence, although residents in the Quebec, Ontario and British Columbia zones also buy significantly in Montreal, Toronto and Vancouver respectively.

Sociodemographics

Respondents to the visual arts survey appear to be quite distinct from the general public. Fully 73% of respondents possess a university degree, compared with 19% of the general public respondents. They are also somewhat more affluent and older, with a large number represented in the 35 to 55 age category. As well, the visual arts sample is enriched by the presence of 21% of respondents who were born outside of Canada, compared with 13% who answered the general public survey. Finally, while 34% of Canadians say they thought about buying a work of art in the previous year, 24% actually reported having purchased.

Psychographics

The <u>devoted</u> and <u>believers</u>, the two psychographic segments most positive about the arts, are among those who say they will likely buy a work within the next two years almost twice as frequently as in the general population. The <u>practitioners</u> report purchasing behaviour in the past one to five years in proportions that match the average for the general public.

Art and Young People

Seven in ten visual arts survey respondents had taken visual arts and craft courses in school, in painting (47% of respondents), drawing (44%), sculpture (18%), and pottery (13%) before reaching the age of 16. However, the fact that the majority of respondents took courses in their childhood should not override the significant minorities among art and craft buyers who say they never took arts courses in school (31%) or outside of school (47%). There is a correlation between childhood experience and adult behaviour, but it is not automatic, which suggests that one may discover the visual arts and crafts, and become a buyer, without having been

exposed to art in childhood, or at least, without recalling such exposure. The general public survey results, nevertheless, supports the correlation between the incidence of childhood artistic experiences and similar behaviour as an adult.

Leisure Time

Cultural activities, such as reading and listening to recorded music, top the list of leisure activities undertaken by visual arts survey respondents, with slightly more frequency than the general public. Similarly, visual arts respondents are particularly likely to attend the traditional performing arts in higher proportions than the general public, particularly theatre, symphonic music, chamber music, contemporary dance, opera and ballet. Finally, visual arts respondents report attending both private galleries and public and private museums and galleries frequently.

Products

A large majority (81%) of visual arts survey respondents are very interested in paintings. Original drawings are of interest to 64% of respondents, and prints and sculptures are evenly of interest at 51% and 49%. The general public demonstrates very similar levels, except that their interest in photographs (27%), second only to paintings among the visual arts categories, and their interest in crafts (30%), is very strong.

Among visual arts survey respondents, three types of crafts have a combined rate of interest of over 50%, and high "very interested" responses: jewellery (27%), ceramics (26%), and glasswork (21%).

Reported Purchase

Six out of ten visual arts survey respondents indicate they purchased a painting in the past five years, followed by purchases of prints (44%). One in three respondents has bought original drawings or sculpture. Photographs and textile works are next at 19% and 14%. Few respondents had bought installations or videographic works of art, however, this must be viewed in the context of their relative non-availability in the marketplace.

The responses to the general public survey reveals that purchases of fine craft works (39% in the last year) and ethnic arts and crafts (21%) are more frequent than purchases of original prints (20%) and original paintings (16%).

Value of Works Acquired and Price

The purchase prices paid by visual arts survey respondents are significantly higher than those paid by the general public. Fourteen percent (14%) of acquisitions fell into categories worth more than $5,000, while less than .5% of the general public respondents reported paying a similar price; 24% of visual arts respondents paid from $1,000 to $4,999, compared was only 2% from the general public.

Nevertheless, works bought for less than $1,000 represent a clear majority (62%) in the visual arts survey, while half of respondents reported that certain acquisitions cost between $100 and $499. One third of general public respondents paid the latter amount.

The results of the survey challenge the perception that art must be viewed as expensive or out-of-reach for purchase by Canadians, especially with regards to prices between $100 and $999.

Points of Sale

The most preferred point of sale for visual arts survey respondents is, by a large majority, the professional artist. In answer to the question, "How do you prefer to purchase a work of art," 55% indicated the artist was their first choice, followed at 28% by commercial galleries. Respondents referred by commercial galleries preferred this point of sale (49%) over all others, although 38% of these consumers indicated they prefer to buy from the artist.

Factors Affecting Purchase

Given a series of seventeen factors that influence purchase, 81% of visual arts respondents enthusiastically agreed that they "really like the artwork and want to enjoy it in (their) own home," while 76% "fell in love with it." A significant 30% "want to add it to (their) collection, while 25% want work that is "intellectually challenging." The reputation of the artist follows. The results overall project a clear message: the purchase of a work of art is a personal, private matter, whether nourished by passion or possession, and it is not perceived by the purchaser as a matter of money or investment.

Cultural Aesthetics

While the point of origin of the work is of little importance to visual arts consumers, when respondents express their preference for works in which the aesthetic is culturally related, there are substantial variations. A majority (58%) express a preference for the contemporary North American or European aesthetic, while 36% prefer the classical North American or European aesthetic.

Works inspired by the aboriginal peoples of Canada receive a preference from one in three respondents, 33% preferring Inuit art and 30% works of art created by native peoples. Significant minorities also express a preference for works of Asian cultures (23% Japanese, 16% Chinese and 12% other Asia), and works inspired by Black African (17%), South American (12%) and Arab (6%) cultures.

Commissioning Works of Art

An encouraging one in three respondents report having commissioned a work of art in the past. Few respondents (13%) say they are prepared to pay more than $5,000 for their commission, and 17% say they would pay less than $500. However, 17% of respondents would pay from $500 to $999, and 27% from $1,000 to $4,999. The overall interest in commissioning work suggests there could be a market for artists and dealers willing to discuss the creation of work with the potential purchaser.

Hours of Operation

Although there are variations by points of sale, most potential consumers favour Saturday and Sunday visits, followed by Friday and Thursday. Early in the afternoon is the preferred time. The results clearly suggest that being open Sunday is very relevant for points of sale in the visual arts.

CHAPTER SIX: Conclusions

The final chapter of the Canadian Arts Consumer Profile examines the strategic marketing implications of the findings, with suggestions for market penetration and market development actions to be taken by arts marketers in order to increase audiences, purchases, and earned revenues.

Finally, the clearest statement of all is that both the general public and the audience consider the "piece being performed" and "falling in love with a work of art" as the two most influential factors affecting their purchasing behaviour. The work of the artist remains the ultimate motivation for the Canadian consumer, and there are many opportunities for arts marketers to remove constraints to purchase and to generate motivation. It is essential that excitement about the excellence of artistic work be better conveyed to what appears to be a willing and waiting audience.

MANAGEMENT COMMITTEE

CANADA

DEPARTMENT OF COMMUNICATIONS

Ronald Holgerson
National Coordinator
Canadian Arts Consumer Profile
Department of Communications
300 Slater Street, Room 356
Ottawa, Ontario
K1A 0C8

Tel: (613) 990-4166
Fax: (613) 952-3632

DEPARTMENT OF COMMUNICATIONS

Geneviève Ledoux
Advisor
Cultural Programs
Regional Operations
Department of Communications
300 Slater Street, Room 1634
Ottawa, Ontario
K1A 0C8

Tel: (613) 990-4197
Fax: (613) 941-2530

Formerly: Daniel Giasson

CANADA COUNCIL

Claire McCaughey
Acting Head
Research & Evaluation
Canada Council
99 Metcalfe Street
Ottawa, Ontario
K1P 5V8

Tel: (613) 598-4341
Fax: (613) 598-4390

Formerly: Yvan Saintonge

PROVINCES

BRITISH COLUMBIA

Richard Brownsey
Director
Cultural Services Branch
Ministry of Tourism,
and Ministry Responsible
for Culture
Government of British Columbia
6th Floor
800 Johnston Street
Victoria, British Columbia
V8V 1X4

Tel: (604) 356-1793
Fax: (604) 387-4099

ALBERTA

Clive Padfield
Director, Arts Branch
Department of Culture and
Multiculturalism
Government of Alberta
11th Floor, C.N. Tower
10004-104 Avenue
Edmonton, Alberta
T5J 0K5

Tel: (403) 427-6315
Fax: (403) 422-0140

SASKATCHEWAN

Paul Fudge
Director of Arts and
Multiculturalism
Family Foundation
Government of Saskatchewan
3211 Albert Street
Regina, Saskatchewan
S4S 5W6

Tel: (306) 787-4753
Fax: (306) 787-8560

MANITOBA

Kathleen MacMillan
Director
Cultural Resources
Department of Culture,
Heritage and Citizenship
Government of Manitoba
8th Floor, 177 Lombard Avenue
Winnipeg, Manitoba
R3B 0W5

Tel: (204) 945-4579
Fax: (204) 945-1684

Alternate:

Doreen Millin
Tel: (204) 945-3849

ONTARIO

Linda Loving
Director, Arts Branch
Ministry of Culture and
Communications
Government of Ontario
3rd Floor
77 Bloor Street West
Toronto, Ontario
M7A 2R9

Tel: (416) 314-7646
Fax: (416) 314-7661

QUÉBEC

Micheline Boivin
Directrice de la recherche
Ministère des Affaires
culturelles
Gouvernement du Québec
225, avenue Grande Allée est
Rez-de-Chaussée, Bloc A
Québec, (Québec)
G1R 5G5

Tel: (418) 643-8824
Fax: (418) 643-4457

NEW BRUNSWICK

Catherine Beck
Cultural Affairs Division
Department of Municipalities, Culture and Housing
Government of New Brunswick
Marysville Place
2nd Floor, 20 McGloin Street
Fredericton, New Brunswick
E3B 5C3

Tel: (506) 453-8720
Fax: (506) 453-2416

Formerly: Bill Leonard

NOVA SCOTIA

Ted Bairstow
Head, Performing Arts
Department of Tourism and Culture
Government of Nova Scotia
Cornwallis Building
4th Floor
1601 Lower Water Street
Halifax, Nova Scotia
B3J 2R5

Tel: (902) 424-6393
Fax: (902) 424-2668

PRINCE EDWARD ISLAND

Bill J. Buell
Senior Policy Advisor
Department of Community and Cultural Affairs
Government of Prince Edward Island
Jones Building
3rd Floor, 11 Kent Street
Charlottetown, P.E.I.
C1A 7N8

Tel: (902) 368-4229
Fax: (902) 368-5544

Formerly:
Alexander (Sandy) Clark

NEWFOUNDLAND

W.B. Frost
Assistant Deputy Minister
Cultural Affairs,
Communications, Historical Resources and Youth Services
Department of Municipal and Provincial Affairs
Government of Newfoundland and Labrador
Confederation Building
3rd Floor, West Block
P.O. Box 8700
St. John's, Newfoundland
A1B 4J6

Tel: (709) 729-3609
Fax: (709) 729-5293

MUNICIPALITIES

VANCOUVER

Burke Taylor
Manager, Office of Cultural Affairs
City of Vancouver
250 West Heritage Building
City Square
555 West 12th Avenue
Vancouver, British Columbia
V5Z 3X7

Tel: (604) 873-7487
Fax: (604) 871-6048

TORONTO

Myles Kesten
Administrator
Toronto Arts Council
141 Bathurst Street
Toronto, Ontario
M5V 2R2

Tel: (416) 392-6800
Fax: (416) 392-6920

MONTREAL

Denis Racine
Cultural Development Officer
Cultural Development Commission
City of Montreal
425, Place Jacques Cartier
Suite 300
Montreal, Quebec
H2Y 3B1

Tel: (514) 872-2074
Fax: (514) 872-0425

(Member of the Provincial Delegation of Quebec)

CANADIAN ARTS CONSUMER PROFILE 1990-1991

FINDINGS

by

DECIMA RESEARCH

and

LES CONSULTANTS CULTUR'INC INC.

MAY 1992

Tu faisais comme un appel
Marthe MERCURE *

Every work of art is created twice : there is the creation of the artist, in front of a blank page, in the light of the studio or under a spotlight, there is the creation of the reader, viewer or spectator, also alone, who allows the work to enter their soul, decodes it and recreates the song or the image so it can talk to their soul, add joy to their day, be a mirror, or lighten their night with laughter.

Art does not exist, is not complete, without the active collaboration of the artist and the attender or viewer.

What do we know about performing arts attenders, what do we know about visual arts lovers, those we call by this somewhat awkward but nevertheless accurate economic term, the arts consumer? What do we know about such individuals who are the essential financial partner of every artist and arts organization? Actually, very little.

The Canadian Arts Consumer Profile is about them, and also about those we call potential consumers and non-consumers. These latter individuals are not as frequently seen in theatres and concert halls or not too familiar with paintings and gallery catalogues. We want them to join in.

The Profile seeks to define what the Canadian population and audiences of various disciplines consider the best circumstances by which to partake of the highly personal exchange inherent in an artistic experience. The research done is itself an embodiment of that collaboration : like the morning after opening night, one can only marvel at the massive number of elements that came together to make it happen.

This report was made possible by the association of three levels of government and public administration; it is also the result of the efforts, advice, cooperation and goodwill of gallery owners, artistic directors, presenters, artists, ushers, agents and arts organizations from across the country who are passionately involved with, and committed to the arts.

But the real stars of the Profile are the dedicated Canadians who persevered and took the time (ask them : a lot of time) to complete more than 65,000 questionnaires, allowing the creation of this fascinating and revealing portrait of Canadian arts consumers which is, to our knowledge, unlike any arts consumer study undertaken anywhere in the world.

The authors and their colleagues hope that their work will match the high expectations of the artistic community and will contribute to increase the number of meetings between works of art and individuals. The opportunity to create the Canadian Arts Consumer Profile has been a great privilege.

François Arcand
Cultur'inc inc.

Michael Sullivan
Decima Research

* Docudrama first presented in Montréal in March 1991, at Fred-Barry hall of the Nouvelle Compagnie théâtrale. The title might be freely translated as *You Were, Somehow, Calling.*

AUTHOR'S NOTE

This report is not a work of art, but a tool to increase sales of performing arts tickets and works of visual arts and crafts. Artistic creation is referred to as products that are grouped by types and purchased in facilities or visual arts points of sale by individuals of certain market segments at a certain price. The Canadian Art Consumer Profile report is often technical ; as most tools, it was built for practical purposes, exactly as are manufactured the sculptor's hammer and the key that opens the theatre backstage door.

As well, there is no art in this report, and the sacred nature of artistic creation is not often actively praised. Please the reader to believe in the authors' respect and commitment : there is no word or percentage in the following pages that is not intended to serve art and its two creators, the artist and the viewer or spectator.

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CHAPTER SIX — CONCLUSIONS

Chapter 1

The Making of the Canadian Arts Consumer Profile

1 THE PROFILE: A TOOL AND A REFERENCE

The Canadian Arts Consumer Profile has been created through the analysis of 65,000 completed questionnaires received from 52,000 Canadians derived through six different questionnaires resulting in a major report:

Chapter 1 - The Making of the Canadian Arts Consumer Profile

In order to assist the reader to fully understand the meaning of the results, and to perceive their limits, this chapter provides essential information about why and how the project was conceived, what tools were created, how and which data were gathered and how they were analysed.

Chapter 2 - People and the Arts

This core chapter of the report is crucial to understanding other chapters. It presents the statistical models and tools developed by the researchers from the data, and provides initial results on Canadians' leisure behaviour, attendance and purchasing behaviour and intention of performances and works of art, media habits and psychographic segments.

Chapter 3 - Performing Arts in Canada

An overview begins this chapter and lays the groundwork for analysis of the general public and audiences performing arts surveys – attendance patterns, behaviour and intentions – as well as presenting an overall picture of performing arts types along with a facility and distribution of facilities and performances inventory.

A subsequent serie of individual sections based on the 11 zones discusses and analyses in more elaborate detail the topics introduced in Chapter 3's Overview for the performing arts.

Chapter 4 - Performing Arts Products in Canada

An overview looks at attendance and interest patterns in broad strokes, for Traditional and Popular performing arts types.

The body of Chapter 4 analyses the similar sets of data utilized in Chapter 3, cross referencing and comparing the general public and performing arts audience responses from a different viewpoint – for each of the 19 performing arts products, with an additional section on festivals.

Chapter 5 - Visual Arts and Crafts in Canada

Using the Visual Arts and General Public surveys, Chapter 5 delves into why, how and under what circumstances Canadians purchase, or would like to purchase, visual arts and crafts products.

Chapter 6 - Conclusions

Contains the market-oriented conclusions and comments of the researchers and suggested points of interest for use by arts marketers.

Methodological Appendix

More about the making of the Profile, particularly regarding methodological challenges, research tools, return rates, etc.[1]

2 GENESIS

The Canadian Arts Consumer Profile is the first pan-Canadian study of both consumers and non-consumers of the performing and visual arts.

The Profile was funded by Communications Canada, the 10 provinces, and the cities of Vancouver, Toronto and Montréal, and intends to serve as a foundation for new marketing initiatives for the arts in Canada. Built from over 65,000 valid completed questionnaires, the Profile will assist comprehensive research about Canada's current and potential arts consumers, therefore contributing to the viability and advancement of the performing and visual arts in Canada.

In May 1989, Communications Canada's Arts and Policy Planning Branch began planning a comprehensive arts consumer survey that would provide performing and visual arts organizations with a marketing tool to help them increase earned revenues. Terms of reference were prepared for the research design, competitive bids solicited, and contracts awarded to the team of Cultur'inc inc., of Montréal, and Decima Research, of Toronto.

Subsequently, the performing and visual arts communities in Halifax, Fredericton, Montréal, Toronto, Winnipeg, Edmonton, and Vancouver were consulted on the issues and questions proposed for the study. The Minister of Communications then presented a research design in October 1989 to Ministers responsible for culture in Canada's 10 provinces, who approved the study in principle and agreed to fund it.

Cultur'inc inc. and Decima Research provided three design options for the Canadian Arts Consumer Profile, and the ministers chose an option priced at $955,000. Communications Canada agreed to pay two thirds; the provincial and municipal partners agreed to collectively pay one third.

The research design was reviewed subsequently by Statistics Canada, revised after consultation with more than 40 arts organizations, and approved by the Cabinet committee responsible for public opinion research.

A Management Committee was appointed to determine content, methodology and design of the questionnaires, as well as to oversee financial and contractual arrangements. The Management Committee was composed of one representative from each province, one representative from each of the participating cities, and three representatives of the federal government, including one from the Canada Council.

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1 Technical appendices (lists, samples, etc.) are available for scientists, researchers or other users than may need specific technical information.

The Committee met several times before the survey to discuss questionnaires, and to vet an inventory of performances, facilities and galleries. Several representatives established advisory committees to discuss issues and questions from the perspective of regional performing and visual arts communities. During the survey, the Committee met to review ongoing reports, and to consider how the final survey results and report could best be used. Liaison between all parties concerned was effected by the National Coordinator.

Cultur'inc inc. was responsible for the survey of performing and visual arts consumers throughout the country while Decima conducted the random sample of the general public, and did the coding, data entry, and data processing. The two companies were jointly responsible for synthesis and analysis of all data, as they prepared the original research design, chose the methodology and developed the research tools.

Surveying began in October 1990, was completed in the fall of 1991 and the results published in 1992.

3 INTENTION

The Canadian Arts Consumer Profile was, from the start, intended to provide information about both performing arts and visual arts. The scope of work was centred on the purchase by individuals of tickets for professional performances and of works of art and craft created by professional artists. Other arts-related activities, such as the practice of art by amateurs, visiting museums or attending amateur performances are referred to for analysis purposes, but are not the object of research. Neighbouring topics, such as the purchase of works of art by private corporations and cultural institutions, were not part of the mandate.

The mandate also established that the purchase of products available in the Canadian market were to be surveyed. In other words, this research analyses Canadians' attitudes and behaviour toward performances and works of art available in their country, and not specifically, or only, the purchasers' attitudes and behaviour toward uniquely Canadian products.

The Management Committee also established that the research territory would be subdivided into 11 zones: British Columbia (and the Yukon) outside of Vancouver, Alberta, Saskatchewan, Manitoba (and the Northwest Territories), Ontario outside of Toronto, Québec outside of Montréal, New Brunswick, the Atlantic Provinces (Prince Edward Island, Newfoundland, Nova Scotia) and the urban areas of Vancouver, Toronto and Montréal.

The mandate set out nine critical objectives and information requirements, designed to elicit data about: Canadians' leisure behaviour, purchasing behaviour, price elasticity, awareness of product differentiation, the sales environment, promotional and advertising issues, and arts-community characteristics, including an inventory of supply. The survey also collected demographic data and data designed to prepare psychographic profiles and to report consumers' motivation and behaviour.

In summary, the research project had two main objectives:

- first, to obtain, at the national level, demographic and psychographic profiles of consumers and non-consumers specific to each type of performing and visual arts product; and
- second, to obtain, at the zone level, general profiles of consumers and non-consumers.

Although audience surveys had been conducted previously for the performing arts, this is the first comprehensive survey in Canada to examine the potential among non-consumers, and to compare motivations for and barriers to purchase among current consumers, potential consumers and non-consumers.

4 RESEARCH DESIGN

The knowledge of sociodemographic profiles of Canadian arts clientele, as stated in previous research, is not as developed as is generally thought.[1] Other consumer studies conducted in France, Australia, England, Sweden and the United States did not offer the needed recognition of artistic variety and were generally too concerned with current audiences, neglecting potential audiences and non-consumers; the research tools often offered limited flexibility or lacked the depth needed to fulfill the project mandate.

From the start, the researchers understood that only an original, multiple-method research design could provide the expected results.

First, a *type of consumers* model was developed and used as the basis of the research. According to this model, the market of any artistic product may be segmented into three large groups:

- Type I, those with a positive attitude and positive behaviour toward a given artistic product, or people already committed to purchasing tickets to performances or works of visual art and crafts;
- Type II, those with a positive attitude but negative behaviour, or people who show an interest but do not currently consume; and
- Type III, those with a negative attitude and negative behaviour, or people who do not attend nor purchase a performing or visual arts product and show no interest in doing so.

The classification of respondents under the three consumer types allows a measurement of interest in and resistance toward purchasing an artistic product, exposes the motivations of present consumers and reveals the constraints which prevent or limit the purchase of such arts products, thereby allowing the development of specific marketing strategies for each consumer type. The model is presented in detail in Chapter 2, along with the statistical tools that were developed to appropriately analyse the data.

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1 *A Survey of Arts Audience Studies: A Canadian Perspective 1967-1984,* Claire McCaughey, Canada Council.

The application of this model necessitated the analysis of reliable data from performance attenders and visual arts purchasers (Type I) and from occasional or non-consumers demonstrating positive or negative attitudes (Types II and III). The researchers chose to conduct three surveys: a performing arts survey, a visual arts survey and a general public survey. Both arts surveys were aimed at Type I consumers (current attenders and purchasers), while the general public survey was to provide particular information about potential and non-consumers (Types II and III).

The performing and visual arts consist of a great number of product types, each consumed on a regular basis by a relatively small percentage of the population. The need to survey 11 geographical zones and to provide results for three different types of consumers added to the methodological challenge of satisfying so many different research objectives.

The general public survey was conducted using a combined telephone-placed mail technique. The initial telephone sample was selected randomly using Decima's own computer generated random sampling technique. The sample frame was designed to ensure that the sample was statistically representative of the national population, as well as the population of each zone.

In all, 11,106 telephone interviews were completed and 5,457 mail questionnaires returned, for an overall response rate to the telephone sample of 49%. Because the sample in the zones was stratified in order to ensure sufficient cases for analysis by community size, the overall sample has been weighted. Details of the weighted sample per zone are found in the Methodological Appendix. The total national weighted sample is 1,705 cases. The confidence interval for a sample of this size is +2.4%, at the 95% level.

Like the general public survey, the respondents for the arts surveys were randomly selected (from among audiences at performing arts facilities, or from the mailing lists of visual arts points of sale). The nonrandom selection, however, of performances and visual arts points of sale at which questionnaires were distributed, was the appropriate methodological choice for the following reasons:

- By intercepting audiences at the time of a selected performance, researchers were able to positively identify the type of product seen.
- The selection of specific types of performances and visual arts points of sales, allowed the attainment of better representation for types of product or points of sale in each zone. With random selection of survey distribution sites, the zones with fewer performances or art galleries would have been less represented than others, and in fact, underrepresentation would most certainly have occurred for many types of performing and visual arts products.

For the performing arts, it was decided to conduct 350 collections from as many performances (351 were actually completed) ensuring a minimum number of collections and a further proportionate allocation of collections in each zone, subject to the availability of each product type. In consultation with the National Coordinator and the Management Committee, artistically representative performances to be surveyed were empirically selected from the inventory of performances for each type and zone. Survey respon-

dents were randomly selected by the venue's front-of-house staff or ushers, for each collection.

For the visual arts, a total of 844 points of sale were surveyed and points of sale managers, acting as intermediaries, were asked to randomly select respondents from their mailing lists.

The methodological choice for the arts surveys fulfills the research objectives, and while it does not allow for statistical representativity of the Canadian population or arts consumers, it does provide representative information about current audiences and purchasers of visual arts and crafts.

Thus, and the reader should keep this in mind when interpreting the results of the Canadian Arts Consumer Profile, **the arts and general public surveys provide reliable, but different types of information and representativity**: the arts surveys provide information about current consumers while the general public survey, in addition to information on potential and non-consumers, also provides the possibility of projecting the results on the Canadian population, i.e., statistical representativity.

Chapter 2

People and the Arts

1 INTRODUCTION

In order to increase the sales of performing arts tickets and works of visual arts and crafts, new research approaches will be required, over and above those currently used by arts marketers. This involves the development of statistical information tools that distinguish the ways individual Canadians relate to the arts. Researchers at Cultur'inc inc. and Decima Research believe that individuals can be, for market development purposes, regrouped as follows:

- Those who have a positive attitude toward the arts – or a specific performing or visual arts and crafts product – and positive behaviour, meaning that they like and purchase the product of their choice (current consumers, performing arts audiences, visual arts and crafts purchasers);
- Those who have a positive attitude toward the arts but negative behaviour, meaning that they like but do not purchase the product of their choice (near consumers);
- Those who have a negative attitude toward the artistic product and negative behaviour, meaning that they do not like and do not purchase this artistic product (non consumers).

Table 2.1

ATTITUDE AND BEHAVIOUR TOWARD PERFORMING AND VISUAL ARTS AND CRAFTS

	Type I Current consumer	Type II Near consumer	Type III Non consumer
Attitude toward arts	+	+	–
Behaviour toward arts	+	–	–

This model suggests that different marketing strategies can be applied by various artistic organizations to address each group of individuals. For example, marketers will be better able to:

- understand the nature and motivation of actual audiences and therefore enhance and develop marketing projects and programs to maintain and increase ticket sales, subscriptions sales, and renewal rates as well as private donations (market penetration);
- ascertain what is preventing individuals who appreciate certain types of art work from purchasing; and as well, identify constraints that can be properly addressed in order to transform the behaviour from negative to positive (market development);
- develop projects that will reduce the perception of barriers for the non consumers, and/or review current marketing strategies to concentrate investment where there is more potential.

To apply this theoretical model, new variables were created in data sets for attendance behaviour and intention for both Traditional and Popular performing arts, as well as for purchase behaviour and intention for works of visual art and works of craft.

1.1 Statistical Tools

To apply this model to the performing and visual arts and crafts in Canada, statistical tools are needed to describe what defines the relationship between individuals and plays, concerts or works of art. The Canadian Arts Consumer Profile does this in three main ways: looking at sociodemographics, behaviour and intended behaviour, and finally attitudes and values toward art.

1.1.1 SOCIODEMOGRAPHICS

Sociodemographics refers to the tools used to describe the nature of a population or subgroup within a population. It describes the population in terms of age, gender, education, household income, marital status and so on.

In addition to standard sociodemographic variables, additional variables were created for the Profile:

- Life cycle stage: this seven-stage variable describes individuals in terms of age, marital status and the presence or absence of children in the home. The stages follow the normal stages of human development – being young and single, married or living in a common-law relationship, living a family life with or without children, being left in the "empty nest" after children have moved on, and widowhood.
- Leisure time availability: this variable describes the amount of time Canadians have for their leisure activities.
- Leisure activities undertaken: this variable describes three patterns of leisure activity.
- Community size: this four category variable describes respondents' communities in terms of large urban centres of 1 million or more, cities between 100,000 and 999,999, cities between 10,000 and 99,999 and communities of fewer than 10,000.
- Zone: this variable consists of the 11 zones surveyed for the Profile.

1.1.2 BEHAVIOUR AND INTENDED BEHAVIOUR

The Profile examines Canadians' declared behaviour about their free time (what Canadians say they do or do not do) and their intended behaviour (what people say they would like to do). Individuals are regrouped according to their attendance behaviour at the performing arts (positive or negative), their frequency of attendance and their intention to attend more. The same is done with purchasing behaviour toward works of visual art and crafts. The constraints, or reasons for not adopting a self-desired behaviour, are also examined.

The theoretical model shown in Table 2.1 is put in concrete form through the analysis of behaviour and intended behaviour.

1.1.3 ATTITUDES TOWARD THE ARTS

It has long been held that while attitudes do not translate clearly and directly into behaviour, the attitudes a person holds nonetheless do have some impact on related behaviour. To this end, a series of specific statements were developed for all three studies that were designed to measure values, perceptions and attitudes toward various aspects of arts purchasing. Thus, attitudes toward going out, the context in which a show is attended, some barriers to attendance, and the values Canadians ascribe to the arts and artists are also measured.

While these statements make for fascinating analysis on their own, when developed with a segmentation model of various orientations toward the arts they provide a powerful tool for understanding how specific values, perceptions and attitudes inter-connect. A psychographic model of eight types defined through cluster analysis of shared attitudes and values has thus been developed.

This chapter is centred on how Canadians relate to the arts, while the sociodemographic and behaviourial tools are introduced and applied to assess the leisure behaviour of the Canadian population. In general terms, performing arts attendance and visual arts and crafts purchasing behaviour are described, followed by a review of the media-use patterns of Canadians, the results of the segmentation analysis and the psychographic typology and tables. In Chapters 3, 4 and 5 all tools are extensively used to present zonal variations, particular market realities and the market potential for each type of performing and visual arts and crafts product. Using the same tools, the characteristics of the Canadian population, and those of specific audiences and purchasers, are also compared.

2 LEISURE TIME AND THE ARTS

2.1 Leisure Time

Although there is some divergence in the amount of time Canadians say they have available to spend on leisure activities, six-in-ten say they have between 10 and 30 hours a week. The mean number of hours is 17.

Many of these leisure activities appear to take Canadians out of their homes for a number of evenings a week. In fact, half (52%) the population report that they are out of their homes at night for non-work related reasons at least three nights of the week. Only 6% report that they do not go out of the house at least one night a week.

These outings are not just restricted to weekends. Only one-in-five Canadians say they are at home every weeknight. A plurality report being out one weeknight (35%), and another 29% say they are out two weeknights. While 15% say they are out three or more weeknights, fully 84% report being out at least one weekend evening.

2.2 Leisure Activities

2.2.1 ACTIVITIES UNDERTAKEN IN THE LAST YEAR

Table 2.2

SELECTED LEISURE ACTIVITIES UNDERTAKEN LAST YEAR: 1990–1991
(in rank order)

	Percentage
Listened to records/tapes/ CD at home	88
Watched a video at home	87
Entertained at home	86
Read a book	85
Bought records/tapes/CD	72
Gardened (in season)	56
Visited an amusement/theme park	48
Camped/hiked	47
Played pool/darts/bowling	46
Attended amateur/student performance	43
Biked recreationally	43
Worked as a volunteer	37
Photographed (as a hobby)	34
Fished/hunted	31
Cross country/downhill skied	28
Played golf	23
Took part in a live performance of some type	24
Played a musical instrument	22
Played a racquet sport	18
Whale/bird watched	14
Sung in a choir	6

Both at home and out of the home, Canadians report undertaking a wide range of leisure activities in the course of a year, from reading a book at home (85%, see Table 2.2) to attending a concert/performance in an auditorium or hall (58% report going at least once a year, as seen in Table 2. 3).

While some activities appear to be unusually high in terms of the proportion indicating the undertaking of an activity, it should be kept in mind that responses are based on respondents' own definitions of a specific activity. Thus, for example, the large proportion who reportedly read a book in the last year, may include those who read manuals or glanced at a book of photographs. Other activities, such as "biked recreationally," are less open to interpretation. Caution is therefore necessary before interpreting responses to Table 2. 2 too literally. Given this caution, the relative positions of activities is probably a more meaningful way of interpreting the results than a literal and close scrutiny of each percentage.

Not unexpectedly, as Table 2.2 makes clear, the most commonly reported activities are those that take place at home. Most (well over 8-in-10) Canadians report that they have entertained at home, read a book, listened to music or watched videos.

Of those activities outside of the home, outdoor activities like camping, hiking, and biking are reportedly undertaken by close to half the population.

Arts participation activities appear to be less frequently undertaken than other leisure activities by a significant mi-nority of the population with over four-in-ten reporting attending an amateur or student performance of some type. Similarly, the fact that close to one-in-five report either playing an instrument in the last year or taking part in a live performance is significant.

2.2.2 ACTIVITIES OUTSIDE THE HOME

While Canadians seem to go out on a regular basis both on weeknights and weekends, a number of activities are undertaken regularly outside the home by a substantial proportion of the population. Other activities, however, appear to be undertaken regularly by only a small proportion of Canadians. These activities are shown in Table 2.3a.

By far the most common activity is that of visiting friends or relatives. Close to half the population say they do this at least once a week. Another frequently undertaken activity is shopping or window shopping for non-household items and over a third report doing this at least once a week. Another relatively frequently undertaken acti vity is playing a sport and/or exercising at a club. In all, close to one third report doing this on at least a weekly basis. Eating out is also a fairly common activity.

Table 2.3a

FREQUENCY OF UNDERTAKING OUT OF HOME LEISURE ACTIVITIES

	At least once a week	At least once a month	Five to ten times a year	One to four times a year	Less than once a year/never	No Opinion	Total proportion reporting activ. at least once a year*
	%	%	%	%	%	%	%
Visit friends/relatives in their home	47	33	10	5	1	4	99
Shop/window shop (non-grocery/ non-household)	37	33	12	10	3	5	97
Play a sport/go to an exercise club	29	12	9	10	30	10	67
Eat out at a restaurant	22	37	19	14	3	4	96
Attend classes/lectures/meetings	20	12	11	20	26	12	72
Go to a library	9	16	13	12	32	11	56
Drink at a bar	11	16	11	17	33	12	62
Go to a movie	3	14	16	27	29	10	67
Attend a performance in an auditorium/hall	1	5	12	40	29	13	67
Watch a show/performance at a club/bar/night spot	2	7	9	24	44	13	48
Attend a professional sports event	2	4	10	26	45	12	48
Visit a museum/art gallery	1	2	8	34	44	12	51
Play bingo	4	2	2	6	72	13	16

* This column has been recalculated to exclude the no opinion responses.

Of those activities that have a cultural flavour, few appear to be undertaken with any great frequency, but a substantial proportion of the population do report involvement at least once a year. Visiting a library is one of the most frequently reported of these activities. This is the activity that is also presumably the most accessible and is relatively cost free; half the population report visiting at least once a year and a quarter report going to a library at least once a month. This is more than report going to see a movie in a movie theatre. Only 17% report going to movies on at least a monthly basis. Canadians, however, see more movies than are reported here, because so many, as noted in Table 2.2, report having watched a video of some kind in their home. The availability of movies for viewing at home has likely blunted demand for going out to movie theatres.

In fact, further analysis indicates that those who report going out to a movie theatre, on at least a monthly basis, are invariably younger. While 48% of those aged 16 to 24 report going out to a movie at least once a month, and 19% of 25 to 34 year olds do, only 8% of those 35 years or older report this. Much the same pattern is also apparent for shows performed at clubs or bars. Those under 25 years are invariably the most likely to attend. However, even among this group, only 25% report seeing shows performed at clubs and bars on at least a monthly basis.

Table 2.3b

UNDERTAKING OUT OF HOME LEISURE ACTIVITIES AT LEAST ONCE A YEAR:

VARIATIONS BY COMMUNITY SIZE

	1 million or more %	100,000 to 999,999 %	10,000 to 99,999 %	under 10,000 %
Visit friends/relatives in their home	95	95	94	94
Shop/window shop (non-grocery/non-household)	94	93	90	88
Play a sport/go to an exercise club	65	64	54	53
Eat out at a restaurant	94	92	93	90
Attend classes/lectures/meetings	64	66	62	57
Go to a library	62	64	52	46
Drink at a bar	55	58	52	52
Go to a movie	72	64	55	46
Attend a performance in an auditorium/hall	63	63	55	48
Watch a show/performance at a club/bar/night night spot	44	47	38	39
Attend a professional sports event	49	47	36	36
Visit a museum/art gallery	47	51	38	37
Play bingo	12	13	15	20

A substantial majority (67%) of the population report some form of attendance at performances in halls and under three-in-ten report no attendance throughout the year. A plurality (40%) report attending between one and four performances a year, while 18% report more frequent attendance. (The types of events defined by respondents are probably quite broad and probably include pop/rock, jazz and other forms of Popular perform-

ing arts as well as the traditional forms, i.e., theatre, symphonic music, etc.). Few (6%) report at least monthly attendance.

The cultural activity that appears to be less frequently undertaken is that of visiting museums and art galleries. But even here, close to half report visiting at least once a year, although only 3% report visiting on at least a monthly basis.

When we look at those who undertake these activities at least once a year, there is some variation in terms of community size. Clearly there is minimal, if any, variation in some activities namely visiting friends and relatives, and eating out in a restaurant. However, in comparison to larger community sizes, there is a tendency in the data for lower proportions of those in smaller communities of under 100,000 people to partake in these activities at least once a year. As Table 2.3b indicates, variations are greatest for going to a movie where the proportion indicating they go to a movie increases steadily as community size increases from a low of 46% in communities of under 10,000 people to a high of 72% among those in the three larger urban centres. Larger variations between community sizes also emerge with respect to going to a library, attending a performance in an auditorium or a hall, attending a professional sports event, playing a sport or going to an exercise club, and visiting a museum or art gallery.

2.2.3 Attendance at Performances

The obvious importance of the availability of performances and concerts is evident from the fact that there is a strong relationship between the frequency of reporting attendance and community size. The larger a community a person lives in the more frequently they report attendance. Thus, among those in cities of 1 million or more, as Table 2.4 makes plain, 9% report attending a performance at least once a month, while in communities of less than 10,000 only 3% report this level of frequency. Similarly, only 30% in large metropolitan areas report seeing no performances in a year, while in those communities of less than 10,000 people the percentage stands at 45%.

Variations in reported attendance by zone tend to be small. Toronto and Montréal residents are somewhat more likely to report attendance than elsewhere. In all, 24% in Montréal and 23% in Toronto say they attend at least five performances/concerts a year, compared with 18% nationally saying this. Elsewhere, variations by zone are not large, although Saskatchewan (14%), New Brunswick (13%) and the rest of the Atlantic region (13%) all report below average attendance as measured above.[1]

There are some variations in reported attendance by sociodemographic variables, and these are shown in Table 2.4. Gender variations are minimal, as are variations by household income, except for the more affluent households (those earning in excess of $60,000), where reported attendance is greater. Attendance appears to be quite strongly linked to education level, with those with the highest level of education reporting the most frequent attendance.

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1 In most instances the proportion of no opinion/non-response on the portion of the survey completed by mail is below 5%. On some batteries of questions it exceeds this proportion. In such situations, the no opinion/non-response is shown. Also in some instances the proportion of no opinion/non-response is heavily skewed by things like age as it is in Table 2.4. When this occurs responses have been recalculated for discussion in the text, but the table itself has not been recalculated. However, when the percentage of non-responses exceeds 15% the table has been recalculated to exclude non-responses.

Table 2.4

SOCIODEMOGRAPHIC VARIATIONS IN CONCERT/PERFORMANCE ATTENDANCE

	At least once a month	5 to 10 times a year	1 to 4 times a year	Less than once a year/never	No opinion**
	%	%	%	%	%
GENDER					
Male	7	14	46	33	13
Female	7	15	45	31	14
AGE					
16 - 24 years	10	19	46	24	5
25 - 34 years	5	12	46	37	7
35 - 44 years	4	12	49	35	8
45 - 54 years	7	16	45	32	13
55 - 64 years	9	16	39	35	25
65 years or older	13	16	38	33	39
HOUSEHOLD INCOME					
Less than $20,000	9	13	37	39	24
$20,000 - $29,999	7	14	43	36	14
$30,000 - $39,999	6	14	47	34	10
$40,000 - $49,999	8	13	50	29	8
$50,000 - $59,999	5	15	47	31	7
$60,000 - $74,999	9	23	43	26	7
$75,000 or more	10	24	50	16	8
EDUCATION (highest level)					
Less than high school	4	6	38	52	29
High school diploma	5	10	44	42	14
College	5	14	47	34	13
Some university	8	17	55	20	9
Bachelor's degree	10	22	48	21	7
Grad./Prof. degree	13	26	45	18	6
Student	12	20	48	20	4
LIFE CYCLE STAGE*					
Single, under 45 years no children at home	11	18	47	24	6
Married, under 45 years, no children at home	6	13	45	33	7
Married, under 45 years, children present	2	11	48	39	7
Single parent	7	14	42	37	14
Married, 45 years and more, children present	6	14	48	32	16
Married, 45 years and more, no children at home	6	17	42	32	23
Single, 45 years and more, no children at home	15	18	34	33	33
COMMUNITY SIZE					
1 million or more	9	16	45	30	12
100,000 — 999,999	8	15	47	31	13
10,000 — 99,999	5	14	46	34	17
Less than 10,000/rural	3	9	42	45	15

* The married category in the life cycle variable includes those living in a common-law relationship.
** Percentages have been recalculated to exclude no opinions.

Age also shows some variations, with those under 25 years and those over 45 years being the most likely to attend on a regular basis. However, for those over 45 years of age two patterns tend to emerge. There is a group of fairly frequent attenders and a group of non-attenders. Thus among those 45 years and above, 27% of those who express an opinion say they attend a performance at least five times a year, but 34% of those answering the question say they never attend or do so less than once a year. By comparison, 16% of those 25 to 44 years of age who answered the question say they attend at least five times a year, while 36% of this age group report attending less than once a year or never.

While age is clearly related to patterns of attendance, stage of the life cycle helps to clarify this pattern. Those who are single and under 45 years of age, without children are among the most frequent attenders of performances: in all, 29% of those answering the question from this group say they attend at least five times a year. The other group of frequent attenders are singles over the age of 45 years with no children at home. Most of this group are widowed. In all, 33% who answered the question among this group say they attend concerts or performances at an auditorium at least five times a year.

Table 2.4 also indicates that those least likely to attend are married, with children at home, and under 45 years of age. Only 13% of this group report attending at least five times a year.

Overall, the age and life-cycle results suggest that attendance for young singles is quite high, but that once married or settled into a live-in relationship attendance declines, and declines further once children arrive. Attendance is higher for those over 45 years with children at home than for those below that age. This suggests that once the early child raising years are passed attendance increases. This cannot be definitively stated, however, because time series data would be required to prove this point. Attendance is also higher for older people, especially singles with no children at home, again suggesting further freedom of movement, as well as possibly greater discretionary income.

It is often claimed that individuals with children have less money and time available than those without. It is also said that empty nesters tend to go more to performances when they find themselves freer. Both of these claims appear to be supported by the results reported here. Given this, it is surprising to see that 63% of single parents, supposedly with less time and money available, report going to one or more performances a year. This is a little less than married parents of 45 years old and more (68%), and slightly more than married couples of 45 years old and more without children (61%). Possibly, single parents, despite generally more limited finances, have a greater need to get out of the home than other parents and see concerts as a way to do this.

2.3 Patterns of Leisure Activity

While there are clearly some activities that are undertaken more frequently than others, there are also sets of activities that are more likely to be undertaken by the same people. Using a technique called factor analysis, which groups responses according to their closeness to a unifying underlying dimension, three broad sets of activities can be identified. These are shown in Table 2.5.

Table 2.5

PATTERN OF ACTIVITIES

TRADITIONAL	FAST LANE	SOCIAL
Go to a library	Drink at a bar	Shop/window shop for non-household items
Visit a museum/art gallery	Watch a performance/show at a club/bar/night spot	Visit friends/relatives
Attend class/lecture/meeting	Go to a movie	Eat out at a restaurant
Attend performance in an auditorium	Attend professional sports event	
	Play a sport/exercise	

The first set involves "traditional" cultural activities and includes visiting a library or museum and art gallery, and attending performances in halls. In addition, attending classes, lectures and meetings also tends to be a part of this factor, that is, those who undertake this latter activity also undertake the other activities cited above. Further analysis also indicates that those who attend performances and concerts are the most likely to visit museums and art galleries compared with all other activities shown earlier in Table 2.3a.

Traditional activities allow interiorization; they imply some planning, a certain regularity and effort. The satisfaction is not immediately provided and seems more personal and inner oriented than the two other groups.

The second set involves what could broadly be described as pop culture or "fast lane." Thus, there is a portion of the population who frequent bars and attend performances in clubs, who go to movies and sporting events and who are members of sports or exercise clubs. These activities tend to cluster together in the factor analysis suggesting that the same people are involved in these activities. As noted earlier, typically these activities are undertaken by young people under the age of 25 years, singles, with no children, and often male rather than female.

Fast lane activities in most cases seem to have in common the possibility of immediate satisfactionwith no or little need for planning. They place the individual in contact with a large group of persons.

The third set groups those who shop regularly for non-household goods or visit friends and relatives into another smaller set of related activities. Eating in restaurants and playing bingo are also part of the cluster but with a relatively low level of correlation. Person to person interactions seem to characterize the context of satisfaction for social activities.

These broad categories may be useful for marketing purposes, as they tend to correspond to previously observed dualities related to various leisure activities selection criteria. Marilyn G. Good[1] develops two sets of three attributes that appear to distinguish a

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1 Marilyn G. Good, Staying Away–Why People Choose Not to Visit Museums, Museum News, Volume 6, No. 4, April 1983.

museum's frequent visitors (having the challenge of new experiences, having an opportunity to learn, and doing something worthwhile in leisure time) and non-participants (being with people, participating actively, and being comfortable and at ease with surroundings). As Table 2.5 suggests, traditional activity may relate to the attributes of frequent goers to museums while the two other types correspond with the attribute's characteristic of non-participants.

2.4 Interest in Going Out More

Although most people surveyed appear to be out of the house on a regular basis, most indicate that they would like to go out more often. As Table 2.6 makes clear, the interest in going out applies to both weeknights and weekends.

Table 2.6

INTEREST IN GOING OUT MORE OFTEN

	Percentage
Yes	67
Weekday evenings	11
Weekend evenings	29
Both weekday and weekend evenings	27
No	32

Irrespective of the number of times Canadians report being out of the house for non-work related purposes large majorities report that they would like to go out more. Even among those going out in excess of four or more nights a week, over 60% say they would like to go out more often. Among those out of the house fewer than three nights a week, over 70% say they would like to go out more often. Clearly there is strong interest in getting out on a more frequent basis.

When actual activities are considered, (see Table 2.7) it is clear that those expressing an interest in going out more have a wide range of activities they would like to undertake more frequently. Moreover, the choices made bear little relation to what is currently undertaken in terms of frequency. Thus, the single greatest demand, expressed by two thirds of the population, is to attend more performances or concerts in an auditorium. This is followed by eating out, and playing sports or exercising at a club. Visiting a museum or art gallery more frequently is also of some interest to respondents: over one-in-three express an interest in this activity. Clearly, these responses suggest that there is considerable interest in attending more performances.

Further analysis (see Table 2.8) indicates that those who would most like to attend more performances already attend an above average amount. Thus, those who attend at least five times a year are easily the most likely to also want to attend more frequently. This suggests considerable market penetration potential. However, even among those reporting that they attend a concert or performance less than once a year, nearly six-in-ten indicate some interest in attending. Moreover, even among this non-attending group, only in the areas of eating out at a restaurant more frequently (62%) and going to a movie (57%) do more people in this group express greater interest in an activity.

Table 2.7
LEISURE ACTIVITIES LIKE TO DO MORE OF
(Percent Saying Like to Do More Often to Each)

	Percentage
Attend concert/performance in an auditorium/hall	66
Eat out at a restaurant	62
Go to a movie theatre	57
Visit friends/relatives in their home	54
Play a sport/go to an exercise club	52
Attend professional sports event	40
Visit a museum/art gallery	37
Watch a show/performance at a club/bar/night spot	36
Shop/window shop (non-grocery/non-household)	31
Attend class/lecture/meetings	28
Drink at a bar	18
Go to a library	18
Play bingo	9

Table 2.8 also indicates that women (those under 55 years of age) more highly educated, but not necessarily the most affluent are the most likely to express greater interest in attending more performances. However, Table 2.8 also shows that most demographic groups report a fairly high level of interest in attending performances more frequently.

By community size, those who tend to have a greater choice of performance types are also somewhat more likely to report a greater interest in attendance. However, even where availability is limited, in smaller towns and rural areas, interest in attending more often is high.

Finally, Table 2.8 also indicates that a comparison of currently reported attendance at performances with reported desire for greater attendance reveals further interesting dimensions. First, while men and women have similar frequencies of attendance, women are more likely to express somewhat greater interest in more attendance. Similarly, the fairly high level of attendance reported among older Canadians is not matched by a similarly high level of interest in more frequent attendance. In fact, as noted, those over 54 years report relatively low levels of interest in greater attendance. At the same time, those with lower levels of income and education also express a strong interest in attending, even though their reported attendance is relatively low. This suggests a significant marketing opportunity among middle income Canadians.

The pattern of a relatively high level of attendance and lower interest in greater attendance only applies to older people. As Table 2.8 points out, for both income and education, more affluent and better educated Canadians tend to have high levels of reported attendance and a strong interest in more frequent attendance.

The other exception to this principle is that of community size. Those in smaller communities, while they report lower levels of attendance, indicate a fairly strong interest in attending more frequently, and certainly well above what the small proportion currently reporting attendance would indicate. As shown in Chapter 3, availability may be the reason for lesser attendance in smaller community more than lack of consumer interest.

Table 2.8

SELECTED SOCIODEMOGRAPHICS OF THOSE ATTENDING FIVE OR MORE PERFORMANCES IN AN AUDITORIUM A YEAR & THOSE INDICATING THEY WOULD LIKE TO ATTEND MORE PERFORMANCES

	Percent Attending Five or More Times a Year	Percent Saying Like To Attend More
FREQUENCY OF ATTENDING PERFORMANCES IN AN AUDITORIUM		
At least once a month	N/A	78
Five to ten times a year	N/A	79
One to four times a year	N/A	74
Less than once a year/never	N/A	57
GENDER		
Male	21	61
Female	22	70
AGE		
16 - 24 years	29	65
25 - 34 years	17	67
35 - 44 years	16	70
45 - 54 years	23	69
55 - 64 years	25	59
65 years and over	29	49
ANNUAL HOUSEHOLD INCOME		
Less than $20,000	22	63
$20,000 - $29,999	21	64
$30,000 - $39,999	20	67
$40,000 - $49,999	21	69
$50,000 - 59,999	20	68
$60,000 - $74,999	32	68
$75,000 or more	34	71
HIGHEST LEVEL OF EDUCATION		
Less than high school	10	51
High school diploma	15	62
College	19	71
Some university	25	69
Bachelor's degree	32	74
Post graduate degree	39	81
Student	22	67
LIFE CYCLE STAGE		
Single, under 45 years no children at home	29	66
Married, under 45 years, no children at home	19	67
Married, under 45 years, children present	13	69
Single parent	21	71
Married, 45 years and more, children present	20	64
Married, 45 years and more, no children at home	23	61
Single, 45 years and more, no children at home	33	55
COMMUNITY SIZE		
1 million and over	22	67
100,000 - 999,999	20	68
10,000 - 99,999	17	63
Under 10,000/rural	10	59

2.5 Barriers to Going Out

While a substantial majority of respondents indicated that they would like to go out more often, there are a number of things that respondents readily identify as barriers to their going out more frequently. These are shown in Table 2.9.

Table 2.9
MAIN REASONS FOR NOT GOING OUT MORE OFTEN

	%
Too expensive	73
Too busy at home	35
Job does not leave me much time for leisure	28
Kind of things I like are not available in my area	25
I don't have anyone to go with	24
Finding/arranging baby-sitting a problem	21
It is too far to get anywhere	19
I often just can't be bothered	17
It is difficult for me to get around much	9

Chief among these barriers is that of the cost of outings. Fully 73% cited this as a main reason for not going out more frequently. Limitations of time are a second significant barrier offered by respondents. In this case, a third of responses indicated that a person was too busy to go out more, while a quarter said that their work did not leave much time for leisure. Distance and availability also featured as reasons for a significant proportion of respondents. A quarter of respondents said that they had no one to go with. Lack of baby-sitters was also a barrier for a significant proportion of the population. In fact on this issue, it is the second most important barrier cited after "too expensive" for couples with children at home under 45 years of age (56%).

The type of activity respondents would like to undertake more frequently does not modify the constraints they cited: the same listing of barriers appears as well for those saying they would like to attend performances more frequently than for the public overall.

When sociodemographic factors are considered concerning why respondents do not go out more frequently there are few significant variations, and generally the significance attributed to specific reasons holds for most groups. There are, however, some notable exceptions. Some caution though needs to be applied in extrapolating these results to those saying they would like to attend more performances, because the question asked was about going out generally and not about performances specifically.

An analysis of responses by those wishing to go to more performances, as noted, reveals the same basic ordering of responses. Specifically older Canadians, that is those above 64 years, are the least likely (54%) to say expense is a barrier to more frequent attendance. This group instead cited a number of factors as barriers – no one to go with (35%), too far (29%), and difficult to get around much (28%). This is not to say the cost of tickets is not a barrier for this group, but that other factors represent as large, if not larger, barriers.

The cost of tickets, perhaps not surprisingly, appears to be a larger barrier for the less affluent as well as the less educated. However, tickets being too expensive is still the

most frequently cited barrier even among the more affluent and more educated. Among those with household incomes in excess of $60,000, 60% cite the expense of tickets as a barrier to greater attendance. Similarly, 61% among those with post-graduate degrees also cite this as a barrier.

In terms of gender differences, there are two of significance. Women are more likely to cite no one to go with as a barrier compared with men (29% versus 19%), in addition to the cost of tickets (75% versus 70%). These two factors may well explain why, despite their greater interest in attending, relative to men, that reported attendance patterns for women are similar to those of men.

Finally, when community size is considered, those in areas of the country with populations of fewer than 10,000 are the most likely to say they do not attend more frequently because it is too far to go (46%). For those in larger communities this issue is relatively infrequently cited.

3 MEDIA HABITS

3.1 Performing Arts

One obvious element in any marketing campaign is the use of the media for publicizing events. Our first look at this issue involves developing a basic understanding of the media habits of audiences and the population overall. Further analysis of actual use of media for finding out about performances is undertaken in Chapter 4.

Canadian audiences and public are quite similar in terms of the extent to which they make use of the major media of newspapers, radio and television. As Table 2.10 makes clear, a little over half of audiences and public alike read a daily newspaper, and almost all report that they read a paper at least one weekday a week. Regular weekend readership of a daily newspaper is equal, if not higher, than weekday readership.

Just as most Canadians, both audience and public alike, read daily newspapers, large proportions spend a good part of their week tuned into radio and television. Close to half the population report at least ten hours tuned to either media and few report no exposure during the course of a week.

Differences between Traditional performing arts audiences and Popular performing arts audiences, as shown in Table 2.10 are slight.

While there has been much discussion of late regarding the declining television audience, it continues to be a dominant medium for advertising. However, of obvious importance is the question of targeting messages during the most appropriate shows. To this end, Table 2.11 shows responses from questions that asked about viewership preferences.

The responses of the audiences and the public are not strictly comparable because slightly different questions were asked. Audiences were asked to identify the frequency with which they watched the shows listed in Table 2.11 while the public was asked to identify those shows they watched in a regular week. In some instances the categories of shows are also different.

Table 2.10

MEDIA HABITS

	Audience			General Public		
	TOTAL %	TRADITIONAL %	POPULAR %	TOTAL %	TRADITIONAL %	POPULAR %
FREQUENCY READING DAILY NEWSPAPER (MON.-FRI.)						
Five days	57	59	54	54	58	55
Three/four days	16	5	7	19	18	20
One/two days	19	19	20	21	19	20
Never	5	5	5	5	3	4
No opinion	2	2	2	1	0	0
FREQUENCY IN MONTH READ DAILY NEWSPAPER (WEEKEND)						
Four weekends	63	65	58	59	62	60
Two/three weekends	18	17	20	20	21	21
One weekend	7	7	8	8	8	8
No weekends	9	9	12	12	8	10
No opinion	2	2	2	1	1	1
NUMBER OF HOURS A WEEK LISTEN TO RADIO						
30 hours or more	13	13	13	14	13	15
20-29 hours	13	13	14	11	11	11
10-19 hours	21	21	20	19	20	20
6-9 hours	20	20	21	19	19	20
1-5 hours	24	24	24	27	28	26
Less than one hour	7	7	7	9	8	7
No opinion	2	2	2	1	1	1
NUMBER OF HOURS A WEEK WATCH TV						
30 hours or more	6	5	6	12	9	11
20-29 hours	13	13	14	22	18	20
10-19 hours	28	27	29	34	35	34
6-9 hours	24	24	24	19	23	21
1-5 hours	22	22	20	12	14	13
Less than one hour	7	8	5	2	1	1
No opinion	1	1	1	30*	29	29

* As a result of the high no opinion rate, responses have been recalculated excluding the no opinion response.
The high no opinion rate on this item is a result of the question's location in the questionnaire.

Table 2.11 appears to indicate that, at least for the public, the most watched types of shows are movies. (This category was not included in the audience questionnaire.) In all, 87% of the public report watching this type of material regularly. What is less clear, is the extent to which this is rental videos or actual programming. If much of this viewing is rental videos, as is likely to be, then in fact news, current affairs and documentary type shows are the most frequently watched types of television programming.

Table 2.11
TELEVISION VIEWING PREFERENCES

	Audience (% watch very often/ regularly)			General Public (%citing each type as being watched in a regular week)		
	TOTAL	TRADITIONAL	POPULAR	TOTAL	TRADITIONAL*	POPULAR
	%	%	%	%	%	%
TV SHOWS/RENTAL VIDEOS WATCH**						
News/current affairs/ Documentaries	71	72	70	78	80	78
Night-time drama	26	25	29	54	55	54
Dance/classical music/opera	24	29	15	-	-	-
Ballet/dance	28	-	-	10	15	12
Classical music	20	-	-	13	18	13
Opera	24	-	-	7	11	7
Situation comedy	23	20	32	61	62	66
Sports	20	19	25	49	47	52
Variety shows/talk shows***	14	12	18	51	51	53
Pop/rock/country	8	-	-	39	-	-
Music shows	9	7	14	39	33	44
Day-time drama	7	6	9	22	18	21
Movies	-	-	-	87	87	89
Television plays	-	-	-	28	34	28

* Those included in the Traditional and Popular categories report attending at least one Traditional or Popular performance in the last six months.
** Rental videos asked in the general public questionnaire, in addition to the television programs watched.
*** Talk shows were included with variety shows as a category in the general public questionnaire.

Although there is little disagreement between audiences and the public overall on the importance of news/documentary type programming, elsewhere there are wide divergences between the two groups in terms of the types of programming preferred. Among audiences, no one type of program is a clear second preference. Night-time drama, situation comedy, sports, as well as Traditional performing arts shows all receive approximately the same level of reported viewership. However, this is well below that accorded to news and documentary type programming.

There are, though, some differences between traditional and popular audiences in program preference. While Traditional performing arts audiences are, not surprisingly, more likely to prefer watching dance, classical music and opera, similarly, those who attended a Popular type performance report watching more pop, rock and country music shows. At the same time, Popular performing arts audiences also report that they are more frequent viewers of situation comedies, variety and talk shows.

Among the public, situation comedies appear to be next in viewership behind news type programs. This is followed by sports, variety and talk shows and night-time drama, all

equally popular, with about half the population saying they view these types of programs regularly.

In terms of the performing arts on television, interest in Popular type performances is quite high, with close to 40% saying they watch this type of programming regularly. Interest is also high for television plays. Close to three-in-ten say they view this type of programming on a regular basis. The other Traditional performing arts fare less well, with between 7% and 13% reporting regular viewing. This lower figure, though, may represent limited availability as much as limited interest.

3.2 Visual Arts

Table 2.12 shows media habits for visual arts survey respondents and those among the general public who purchased a work of art in the last year. Among visual arts respondents and visual arts purchasers the public media habits follow those of the audience and general public to a large extent. The main exceptionS are the higher proportion of visual arts purchaserS relative to the other groups who read newspaper daily and regularly on weekends and the lower proportion of this same group who report heavy television viewership. Visual arts respondents are the most likely to view television for less than five hours a week.

Table 2. 12

MEDIA HABITS

	Visual Arts Respondents	Population Visual Arts Purchasers*
	%	%
FREQUENCY READING DAILY NEWSPAPER (MON.-FRI.)		
Five days	64	59
Three/four days	14	20
One/two days	16	17
Never	6	4
No opinion	0	0
FREQUENCY IN MONTH READ DAILY NEWSPAPER (WEEKEND)		
Four weekends	69	64
Two/three weekends	17	20
One weekend	7	8
No weekends	7	8
No opinion	1	0
NUMBER OF HOURS A WEEK LISTEN TO RADIO		
30 hours or more	12	14
20-29 hours	12	12
10-19 hours	20	22
6-9 hours	20	18
1-5 hours	27	24
Less than one hour	7	8
No opinion	1	0
NUMBER OF HOURS A WEEK WATCH TV		
30 hours or more	2	10
20-29 hours	6	19
10-19 hours	25	36
6-9 hours	23	22
1-5 hours	30	11
Less than one hour	14	2
No opinion	0	28**

* Purchased art work in the last year.

** As a result of the high no opinion rate, responses have been recalculated excluding the no opinion response.
The high no opinion rate on this item is a result of the question's location in the questionnaire.

4 BEHAVIOUR AND INTENDED BEHAVIOUR TOWARD THE ARTS

4.1 Canadians' Behaviour and Intended Behaviour Toward Performing Arts

For the purpose of the Canadian Arts Consumer Profile, the performing arts have been classified using a typology made up of 18 categories, or types of products. Questions about respondents' attendance behaviour and intention to attend more were asked for every category.

After the survey, a statistical model was designed to reflect respondents' actual behaviour and intended behaviour towards the performing arts. In this section, answers are grouped in two general categories to present the model and deliver a first, general assessment of the actual and potential markets for the arts in Canada. In Chapters 3 and 4, the model is applied to respondents' answers per zone and per type of product for specific analysis.

The first general category is made of *Traditional performing arts* — that is major professional non-profit performing arts disciplines — those that are usually recognized by government funding bodies. The second general category consists of *Popular performing arts*, those usually more commercial or privately funded. Due to the fact that family or children oriented theatre, dance or music, and ethnic or heritage performances do not easily fit into either the Traditional or Popular performing arts as defined above and described in Table 2.13 these two types will, where appropriate, be analysed separately.

Table 2.13

TYPES OF PRODUCT FOR BEHAVIOUR /INTENTION
General Public

Traditional performing arts		*Popular performing arts*
Dance		Musicals
	Ballet	Pop / Rock
	Contemporary Dance	Stand-up Comedy
Theatre		Folk
	Drama	Jazz and Blues
	Comedy	Country and Western
	Avant-garde (modern, experimental)	
Music		*Other*
	Symphonic music[1]	
	Pop symphonic music	Children's theatre/dance/ music
	Chamber music and soloists	Ethnic/heritage
	Choral music	
	Opera	

Forty six percent of Canadians, as Table 2.14 notes, report they attended a performance of the Traditional performing arts in the six months preceding the survey, while 21% say

1 Classical Contemporary Music was included only in the audience survey.

they attended at some point in the five previous years. This leaves only 32% that report no attendance in the previous five years at any theatre, classical music or dance performances.

As seen earlier, 66% of respondents declared that they would like, among other out of home activities, to attend more performances in an auditorium or hall. Consistent with this, a majority (64%) of Canadians indicate that they want to attend more Traditional performing arts (theatre, music, dance) while the remaining 36% say they are content with their actual attendance or non-attendance.[1]

Results for the Popular performing arts indicate, not surprisingly, greater attendance: 55% of respondents report that they have attended either a performance of either musicals, pop/rock, stand-up comedy, folk, jazz and blues or country and western in the six months preceding the survey, while 24% say they attended previously, and a mere 20% report that they have never attended a Popular performance.

In addition, three quarters of the population (76%) say they want to attend more of Popular performing arts and the other (24%) say they are content with actual attendance or non-attendance. The combined responses to attendance behaviour and reported intention to attend more are detailed in Table 2.14.

For Traditional performing arts, we see that the great majority of most recent attenders (37%) would like to attend more and the remaining 9% are satisfied with their actual level of attendance. This means that for five recent attenders to theatre, classical music or dance performances, only one is content with his or her actual level of attendance and four would like to attend more. The occasional attenders are content (6%) or would like to see more (14%) in a one-to-two proportion. Non-attenders show an opposite proportion, while 20% are content with non-attending, only 12% report that they would like to attend some Traditional performing arts.

Much the same pattern is apparent for the Popular performing arts. For every seven Popular performing arts recent attenders, six would like to attend more (47%) and only one is satisfied with his or her actual level of attendance (8%). A greater majority of occasional attenders would like to attend more (19%) and 5% declare they are content. In contrast to Traditional performing arts, musicals, pop/rock, stand-up comedy, folk, jazz and blues or country and western, non-attenders are practically equal being content (11%) or wanting to attend performances (10%).

Taken at the level of declared behaviour and declared intended behaviour by the general public, these results indicate the existence of important potential markets for both Popular performing arts and Traditional performing arts for self-reported audiences as

1 While these results are clearly encouraging, some caution must be applied in taking the percentages cited too literally. It may be that the definition normally used within the performing arts in terms of what constitutes a specific discipline and what constitutes a professional performance are not those applied by many in the public. Given this, some overreporting of attendance is likely. Furthermore, there is usually approximately 5% of the population who are likely to give affirmative responses when they, in fact, have not undertaken an activity. Finally, the survey, as noted in chapter 1 while likely reflecting attendance patterns in the public, has a bias of approximately 3% in terms of those indicating an interest in attending. These factors should be taken into account when interpreting the results.

Table 2.14

PURCHASING BEHAVIOUR AND INTENTION

General Public

	Traditional Performing Arts	Popular Performing Arts
ATTENDANCE	%	%
Attended at least once in last six months	46	55
Attended in last five years, but not last six months	21	24
Never attended any of specific types of performance	32	20
INTENTIONS		
Would like to attend at least one more frequently	64	76
Content with frequency of attendance	36	24
ATTENDANCE BEHAVIOUR AND INTENTION		
Attended in last six months, would like to to attend more frequently	37	47
Attended in last six months, content with attendance	9	8
Attended in last five years, would like to attend more frequently	16	19
Attended in last five years, no interest in attending	6	5
Never attended, would like to attend more frequently	11	10
Never attended, no interest in attending	21	11

well as for occasional and non-attenders. It also suggests that self-reported attenders intend to remain in the performing arts tickets market and that there is a significant market penetration and market development potential for the performing arts.

When selected demographic variables are considered for both Traditional and Popular performing arts, clearly there are some significant variations between self-reported attenders and non-attenders in both types of performing arts (see Tables 2.15 and 2.16).

For the Traditional performing arts, women are somewhat more likely to report attendance than men, as are the more affluent and educated. However, even among those with household income below $30,000, a third or more report attendance to at least one type of performance, and more importantly, the great majority would like to attend more frequently.

Perhaps the most interesting finding in Table 2.15 relates to age. Contrary to expectation, where one would assume that simply because of time more people would eventually attend performances, young Canadians are far more likely to report having ever attended a Traditional performance. This might possibly reflect the impact of performing arts attended through school; it may be, though, that young people simply go out more now to a variety of events, compared with people in the past. Over half of those 16-24 years of age (53%) report attending a performance in the last six months.

The impact of where a person lives, in terms of what is available, is also evident in Table 2.15. Those in smaller communities are far less likely to attend performances.

Table 2.15

SELECTED DEMOGRAPHIC VARIATIONS BY ATTENDANCE AND INTEREST IN TRADITIONAL PERFORMING ARTS

	Attended in Last Six Months		Attended in Last Five Years		Never Attended	
	MORE	CONTENT	MORE	CONTENT	MORE	CONTENT
	%	%	%	%	%	%
GENDER						
Male	34	9	14	6	11	25
Female	40	8	16	6	13	17
AGE						
16 - 24 years	46	7	16	7	10	14
25 - 34 years	35	7	17	4	16	19
35 - 44 years	38	7	18	6	12	19
45 - 54 years	38	11	14	6	11	21
55 - 64 years	36	11	10	6	11	25
65 years or older	31	15	7	9	7	32
HOUSEHOLD INCOME						
Less than $10,000	32	7	14	6	11	30
$10,000 - $19,999	28	7	14	6	16	29
$20,000 - $29,999	33	8	12	6	15	26
$30,000 - $39,999	37	9	16	6	13	19
$40,000 - $49,999	42	8	14	5	12	19
$50,000 - $59,999	42	10	18	5	9	15
$60,000 - $74,999	42	11	18	5	9	16
$75,000 and over	53	12	17	6	5	7
EDUCATION						
Less than high school	17	8	10	8	13	35
High school diploma	28	9	15	7	17	25
College	36	9	19	6	12	18
Some university	47	10	16	4	11	12
Bachelor's degree	55	11	16	3	6	8
Grad./prof. degree	60	9	13	5	6	6
Student	54	8	16	6	8	9
FAMILY LIFE CYCLE STAGE						
Single, no children at home, under 45 years	47	8	15	5	10	15
Married, no children at home, under 45 years	36	8	20	6	14	17
Married, children at home, under 45 years	34	7	18	5	15	21
Single parent	38	7	14	8	17	16
Married, children at home: over 45 years	39	10	12	5	11	22
Married, no children at home, over 45 years	34	13	10	7	9	26
Single, no children at home, over 45 years	34	12	11	7	9	27
COMMUNITY SIZE						
1 million or more	44	9	16	6	11	14
100,000 - 999,999	39	9	16	6	11	20
10,000 - 99,999	31	9	16	6	13	26
Less than 10,000/rural	27	8	11	7	15	33

Among those attending Popular performing arts events (Table 2.18), gender variations are minimal and income and education variations are also greatly reduced relative to the Traditional performing arts. Income and education variations are reduced largely because lower income and less educated groups report greater attendance at Popular events, while the more affluent and educated report similar levels of attendance for the Traditional events. This suggests that to talk of a person being an audience for only one broad type of performing art, i.e., Traditional or Popular is incorrect. Audiences are clearly omnivorous.

The relationship between attendance and age is also limited for Popular events. The exception is the higher proportion of non-attenders among seniors, and the higher level of recent attendance among the young (under 25 years). Presumably, young Canadians have the time and discretionary income to be more active than others in the population. Family life cycle variations would certainly seem to bear this out.

While availability in terms of the Traditional performing arts is a likely problem for those in smaller communities, no such problem appears to exist (or at least to the same degree) when community size is considered against attendance at Popular events.

In addition to the demographic analysis indicating quite similar characteristics between traditional and popular audiences, the evidence for believing that there is considerable overlap between the two broad audience types comes from the fact that a large proportion of those who report attending a Traditional performance in the last six months also report attending a Popular type performance and vice versa. The omniverous nature of the audience is evidenced by the fact that 77% of those who have attended a Traditional performing arts discipline in the last six months also report attending a Popular type performance. Similarly, 64% of those attending a Popular performance report attending a Traditional performing arts event.

Finally, in terms of the audience for Traditional and Popular performances, estimates of the proportion of the public attending either type of performance during the six-month period preceding the study can be made. In crosstabulating reported attendance at Traditional performing arts events with those attending the Popular, two thirds (66%) of Canadians appear to have attended either one or the other type in the last six months. This suggests that the market for the various products of performing arts is considerable.

Table 2.16

SELECTED DEMOGRAPHIC VARIATIONS BY ATTENDANCE AND INTEREST IN POPULAR PERFORMING ARTS

	Attended in Last Six Months		Attended in Last Five Years		Never Attended	
	MORE	CONTENT	MORE	CONTENT	MORE	CONTENT
	%	%	%	%	%	%
GENDER						
Male	48	9	18	5	9	12
Female	47	8	20	5	10	10
AGE						
16 - 24 years	69	7	12	2	6	4
25 - 34 years	53	7	23	3	9	5
35 - 44 years	46	7	22	5	11	9
45 - 54 years	42	11	19	6	11	11
55 - 64 years	40	10	19	7	10	17
65 years or older	25	11	11	11	10	32
HOUSEHOLD INCOME						
Less than $10,000	41	6	17	6	12	18
$10,000 - $19,999	41	7	19	6	13	15
$20,000 - $29,999	48	8	17	5	10	12
$30,000 - $39,999	51	8	20	5	7	10
$40,000 - $49,999	49	9	19	4	10	9
$50,000 - $59,999	51	9	20	5	7	8
$60,000 - $74,999	52	10	18	5	9	7
$75,000 and over	55	11	16	5	6	6
EDUCATION						
Less than high school	34	7	16	9	13	22
High school diploma	44	8	22	5	11	10
College	48	8	21	4	9	10
Some university	53	10	15	5	8	10
Bachelor's degree	53	11	19	5	6	6
Grad./Prof. degree	52	11	17	6	4	9
Student	65	7	13	2	7	4
LIFE CYCLE STAGE						
Single, no children at home, under 45 years	65	8	15	3	6	4
Married, no children at home, under 45 years	58	9	18	4	5	5
Married, children at home, under 45 years	45	6	25	4	13	8
Single parent	50	8	16	4	9	13
Married, children at home: over 45 years	37	9	18	6	14	15
Married, no children at home, over 45 years	36	12	16	8	9	19
Single, no children at home, over 45 years	34	10	15	10	10	21
COMMUNITY SIZE						
1 million or more	50	11	18	5	7	9
100,000 - 999,999	49	8	19	5	9	10
10,000 - 99,999	44	6	20	4	12	14
Less than 10,000/rural	43	7	17	7	12	14

4.2 Canadians' Behaviour and Intended Behaviour Toward Visual Arts and Crafts

As with the performing arts, the Canadian Arts Consumer Profile addressed the question of actual and potential markets for works of visual arts and crafts. The survey of the Canadian population contained questions about works of art and craft purchasing behaviour and intention to purchase. A comparable statistical model was also designed to reflect respondents' behaviour and intended behaviour.

For general assessment of actual and potential markets, answers were grouped into two main categories: Works of Visual Arts and Works of Crafts. In Chapters 3 and 4, the same model is applied to respondents' answers per zone or market segment for specific analysis.

Initial focus groups conducted by Cultur'inc inc. in preparation for the Consumer Profile project indicated a low level of awareness of visual arts and crafts product differentiation in the general population, particularly, participants had difficulty in distinguishing between works of art, fine craft and industrial craft. It will be recalled that the Profile was to survey purchasers and non-purchasers of works of art and fine craft, tentatively defined with a "one of a kind or short series" criteria to include prints. Serially printed photographs or posters, factory made inexpensive souvenirs and other similar objects produced in large quantity were not in the scope of the survey. The definition used for visual and craft art work is shown in Table 2.17.

Table 2.17
TYPES OF PRODUCT FOR BEHAVIOUR/INTENTION
General Public

Work of Visual Arts	*Works of Crafts*
Original paintings	One of a kind craft
Original drawings	
Original prints	
Sculptures	
Textile arts	

The double content (art and craft) of the ethnic arts and crafts category and the suspiciously high rate of response for purchase of photographs (24% in the previous six months, 25% in the previous five years) caused these types of products to be taken out of both general categories. In Chapter 5, both types of products will nevertheless be analysed, putting respondents' declared behaviour against price paid and other parameters.

The actual proportion of the population in the art and craft market and the proportion of the population who say they are very likely to purchase an art or craft work in the next two years are shown in Table 2.18[1]. Almost half of Canadians (44%) report that

1 The likelihood to purchase question was included as a "last thoughts" section in wave two of the general public survey. This means that only wave two respondents are included in the analysis of general public art and crafts purchasing patterns. The percentages shown in Table 2.15 therefore only come from Wave Two of the survey.

they have never purchased visual artworks; 24% say they did in the year before the interview and 20% in the previous four years.

Results for works of crafts show a lesser intensity in purchasing behaviour: 57% of respondents report that they have never purchased a one of a kind work of craft, 19% did in the year before the survey and 13% in the previous four years. A minority (16%) of Canadians report that they are very likely to purchase a work of visual art or a work of craft in the next two years.

Table 2.18
VISUAL ARTS AND CRAFTS PURCHASING BEHAVIOUR AND INTENTION
General Public

	Art Work %	Craft Work %
PURCHASE BEHAVIOUR*		
Purchased in the last year	24	18
Purchased in last five years	20	13
Never	44	57
Not asked	12	12
PURCHASE INTENTION**		
Very likely to purchase in the next two years***	16	16
Unlikely to purchase in next two years	82	82
No opinion	2	2
PURCHASE BEHAVIOUR AND INTENTION		
Purchased in last year and		
Very likely to purchase in next two years	9	7
Unlikely to purchase in next two years	15	10
Purchased in last five years and		
Very likely to purchase in next two years	4	4
Unlikely to purchase in next two years	16	10
Never purchased and		
Very likely to purchase in next two years	3	6
Unlikely to purchase in next two years	40	51
Not asked	12	12

* A portion of respondents were not asked the purchasing questions. As Table 2.18 indicates, this totals 12%. This group were those respondents who had not visited a museum or gallery of any kind in the previous five years. This group, it was felt, would be unlikely to be art or craft purchasers, and can be considered an extension of the never purchased group.

** The question regarding likelihood of purchasing read: How likely are you to purchase a work of art or craft over the next two years. As the question indicates no distinction was made between art and crafts. The fact that no distinction between art and crafts was made means that the statistical model applies the same percentage to both categories.

*** Although a four point scale was used to determine likelihood of purchasing art or craft works in the next two years, the categories used in the analysis have been divided in two. Those reporting that they are "very" likely to purchase and all other responses — those saying "somewhat", "not too", or "not at all" likely. The other responses have been defined as the unlikely to purchase group. This distinction was made because based on our previous research experience, only those saying they are "very" likely to undertake an activity, in fact, do carry through with the intent.

In the performing arts data, we saw that more recent and occasional attenders expressed the intention to attend more. For works of Visual Arts, we observe a different phenomena: 9% of these who purchased work in the year before the survey say they are

very likely to purchase and 15% say they are not; those who purchased in the previous four years show an even smaller proportion of intention to purchase, with 4% for and 16% against. Most non-purchasers of paintings, drawings, prints, sculptures or works of textile art report that they are not likely to purchase in the next two years (40%), while only 3% of respondents report that they have never purchased but will very likely do so. Results for works of craft reflect the same pattern but with a smaller gap between the very likely to purchase and the not likely.

The results shown in Table 2.18 suggest that visual arts and crafts products are less frequently purchased with regards to most Canadians' behaviour and intended behaviour than performing arts performances. Moreover, among those reporting that they have purchased art work in the last five years, fully 70% say that they are unlikely to purchase any art work over the next two years. Various factors may be at work explaining the lower level of purchasing and intent and will be explored in Chapter 5. Among these are the higher cost for a work of art compared with a performing arts ticket and the fact that once purchased, a print or a sculpture remains available to its owner, contrary to the short life span of the attender experience. The limited intention to purchase may be partly due to the economic climate at the time of the survey. The recession and the introduction of the Goods and Services Tax possibly has had an impact on declared intention to purchase art and craft works over the next few years.

If fewer Canadians express the intention to purchase works of art and crafts in the near future, a reported intention from 17% of respondents is still a far from negligible proportion and indicates potential.

Arts and crafts purchasing and intent to purchase, show far less variability across demographic groups than was found among the Traditional and Popular performing arts (see Tables 2.20 and 2.21).

With regards to art purchase patterns, as Table 2.19 notes, while there is a tendency for recent purchasing to increase with income, it is only among the most affluent category (household income in excess of $75,000) that purchasing is at all common. Among this group 41% report a purchase in the last year and over half say they will purchase again within two years. Education level appears to be weakly associated with purchasing.

Life cycle stage appears to be a much better predictor of art purchasing behaviour than either age or income. Those who are younger, married without children as well as, to a lesser extent, those with children, appear to be the most likely to be recent purchasers and to indicate their intent for further purchases. Presumably, these groups are in the process of establishing homes and want art work for their homes. A significant proportion of single parents also report themselves to have purchased art work in the last two years.

Much the same demographic patterns are apparent for craft purchasing as were apparent for art work, although there are a few exceptions (see Table 2.20). Women are more likely than men to report recent purchasing of craft work. Those with a B.A. are the most likely group to be recent craft purchasers. Aside from these observations, variations between art and craft purchases are minimal.

Table 2.19

SELECTED DEMOGRAPHIC VARIATIONS BY VISUAL ARTS PURCHASE, BEHAVIOUR AND INTENT

	PURCHASED IN LAST YEAR		PURCHASED IN LAST FIVE YEARS		NEVER PURCHASED		NOT ASKED
	FUTURE PURCHASE LIKELY	FUTURE PURCHASE UNLIKELY	FUTURE PURCHASE LIKELY	FUTURE PURCHASE UNLIKELY	FUTURE PURCHASE LIKELY	FUTURE PURCHASE UNLIKELY	
	%	%	%	%	%	%	%
GENDER							
Male	9	14	5	16	3	41	13
Female	9	14	4	16	4	43	9
AGE							
16 - 24 years	5	14	2	13	5	50	10
25 - 34 years	10	14	5	13	6	42	10
35 - 44 years	13	6	6	17	3	37	8
45 - 54 years	10	14	5	19	2	41	9
55 - 64 years	8	16	5	19	2	37	13
65 years or older	5	7	1	20	1	46	20
HOUSEHOLD INCOME							
Less than $10,000	1	15	3	8	0	57	17
$10,000 - $19,999	6	9	1	13	4	52	15
$20,000 - $29,999	7	13	3	15	3	43	16
$30,000 - $39,999	9	10	3	19	5	44	11
$40,000 - $49,999	9	14	4	19	4	41	11
$50,000 - $59,999	9	19	5	19	5	38	6
$60,000 - $74,999	14	17	8	16	4	35	6
$75,000 and over	22	19	14	16	3	19	7
EDUCATION: highest level							
Less than High School	2	9	2	12	2	50	23
High school diploma	7	13	4	18	4	43	11
College	11	15	5	18	5	35	11
Some university	14	13	10	15	5	37	7
Bachelor's degree	14	19	5	16	5	36	3
Grad./Prof. degree	14	14	12	21	3	32	5
Student	9	16	2	13	3	48	10
LIFE CYCLE STAGE							
Single, no children at home, under 45 years	7	13	4	15	5	46	11
Married, no children at home, under 45 years	13	14	6	15	8	37	7
Married, children at home, under 45 years	9	15	5	15	4	41	10
Single parent	12	20	4	9	4	43	7
Married, children at home: over 45 years	8	16	7	17	2	38	12
Married, no children at home, over 45 years	9	13	2	22	2	40	11
Single,no children at home, over 45 years	7	8	2	17	2	45	18
COMMUNITY SIZE							
1 million or more	9	15	5	18	3	37	13
100,000 - 999,999	9	13	6	17	4	42	9
10,000 - 99,999	9	17	2	14	5	45	9
Less than 10,000/rural	7	12	3	14	3	48	13

Table 2.20

SELECTED DEMOGRAPHIC VARIATIONS BY CRAFT PURCHASE, BEHAVIOUR AND INTENT

	PURCHASED IN LAST TWO YEARS		PURCHASED IN LAST FIVE YEARS		NEVER PURCHASED		NOT ASKED
	FUTURE PURCHASE LIKELY %	FUTURE PURCHASE UNLIKELY %	FUTURE PURCHASE LIKELY %	FUTURE PURCHASE UNLIKELY %	FUTURE PURCHASE LIKELY %	FUTURE PURCHASE UNLIKELY %	%
GENDER							
Male	6	8	4	9	7	54	12
Female	9	14	3	10	5	49	9
AGE							
16 - 24 years	4	8	3	5	6	64	10
25 - 34 years	8	9	5	8	8	52	10
35 - 44 years	12	15	4	10	6	44	8
45 - 54 years	8	13	4	14	5	48	9
55 - 64 years	8	12	2	9	5	51	13
65 years or older	4	6	1	9	3	57	20
HOUSEHOLD INCOME							
Less than $10,000	1	5	1	11	2	63	17
$10,000 - $19,999	4	7	3	9	3	59	15
$20,000 - $29,999	5	9	3	7	5	55	16
$30,000 - $39,999	10	10	2	10	6	52	11
$40,000 - $49,999	7	10	4	10	6	52	11
$50,000 - $59,999	8	15	3	6	9	54	6
$60,000 - $74,999	11	13	7	15	9	40	6
$75,000 and over	19	12	7	11	12	31	7
EDUCATION (highest level)							
Less than High School	1	6	1	8	2	58	23
High school diploma	6	12	3	9	5	53	11
College	11	14	3	8	6	47	11
Some university	11	11	6	12	12	41	7
Bachelor's degree	11	15	5	12	9	45	3
Grad./Prof. degree	12	11	7	10	10	46	4
Student	5	8	3	8	5	61	10
LIFE CYCLE STAGE							
Single, no children at home, under 45 years	6	7	3	7	7	59	11
Married, no children at home, under 45 years	11	13	6	7	11	46	7
Married, children at home, under 45 years	9	13	5	10	5	48	10
Single parent	14	16	3	5	4	51	7
Married, children at home: over 45 years	9	15	3	15	5	42	12
Married, no children at home, over 45 years	6	11	2	8	4	57	11
Single, no children at home, over 45 years	4	7	2	13	5	51	18
COMMUNITY SIZE							
1 million or more	8	11	2	10	7	49	13
100,000 - 999,999	9	12	4	9	7	50	9
10,000 - 99,999	8	11	4	9	5	54	9
Less than 10,000/rural	5	7	3	10	5	57	13

5 ATTITUDES TOWARD THE ARTS

5.1 Introduction

In order to better understand the meaning that performing and visual arts and crafts have for the public, audiences and purchasers of visual arts and crafts, a series of statements were developed for each respondent group that were designed to probe values and attitudes regarding the arts and the context within which purchasing decisions are made.

This section of the report examines responses to these statements for the general public and provides an overview of values and attitudes regarding the arts. Following this, a psychographic or segmentation model is developed that indicates the types of orientations that exist regarding the arts. The zones of this section will be based on the general public data because it includes actual as well as potential consumers, and therefore provides the marketer with the best of both worlds: information as to how to increase market penetration and how to pursue market development.

The approach to identify attitudes toward the arts employs statements in which respondents are asked to identify the extent to which they agree or disagree with each. All agree/disagree questions asked were on a six point scale: agree strongly, agree somewhat, agree slightly, disagree slightly, disagree somewhat and disagree strongly.

In the tables that follow, and in the analysis, the agree slightly and disagree slightly categories have been combined. The reasons for doing this are twofold. First, it makes for a clearer presentation of results. Second, Decima has traditionally interpreted the slightly agree/disagree categories as indicating a very weakly held position and have typically considered these categories as being undecided. These categories are generally treated in a similar fashion in the Canadian Arts Consumer Profile.

In interpreting responses to the agree/disagree statements, it is important to bear in mind that responses indicate respondents "impulsive" reaction to each statement. Most respondents do not ponder the meaning of a question, or look for "hidden" meaning in a statement. Statements are read and responded to quite quickly, so that a "gut" response is recorded. It is the immediate response that is desired. Additionally, responses to one question taken in isolation rarely provide a useful picture. The items are meant to be analysed as sets of statements that provide an overview of an attitudinal landscape rather than a precisely detailed portrait.

Each table also displays a mean score. This is based on a +3 to -3 scale, +3 meaning total agreement and -3 total disagreement. If 100% of the population strongly agree on an item, this would then give a mean of +3, while 100% strongly disagree would give a mean of -3.

5.2 Values and Attitudes Toward the Arts

For ease of presentation, various statements will be analysed and discussed in terms of the issue area that each probes.

5.2.1 CONTEXT FOR AN OUTING

Table 2.21 shows those statements that deal with the context of attending a performance rather than anything about the performance or artists per se. As was apparent from an earlier discussion in this report, Canadians appear to enjoy going out and many of them have, in fact, attended some type of performance in the last six months. Table 2.21 fills out this fact with more details about the context of this issue.

As Table 2.21 makes clear, going out to a concert or performance remains a special event. In all, two thirds either strongly or somewhat agree with this position. And as a special event it clearly requires some planning. At the same time, it is typically not such a special event that it is linked to celebration only.

It is also clear that when Canadians go out they basically want to relax and be entertained. In all, over two in three strongly agree with this position. This is the strongest level of agreement across all statements.

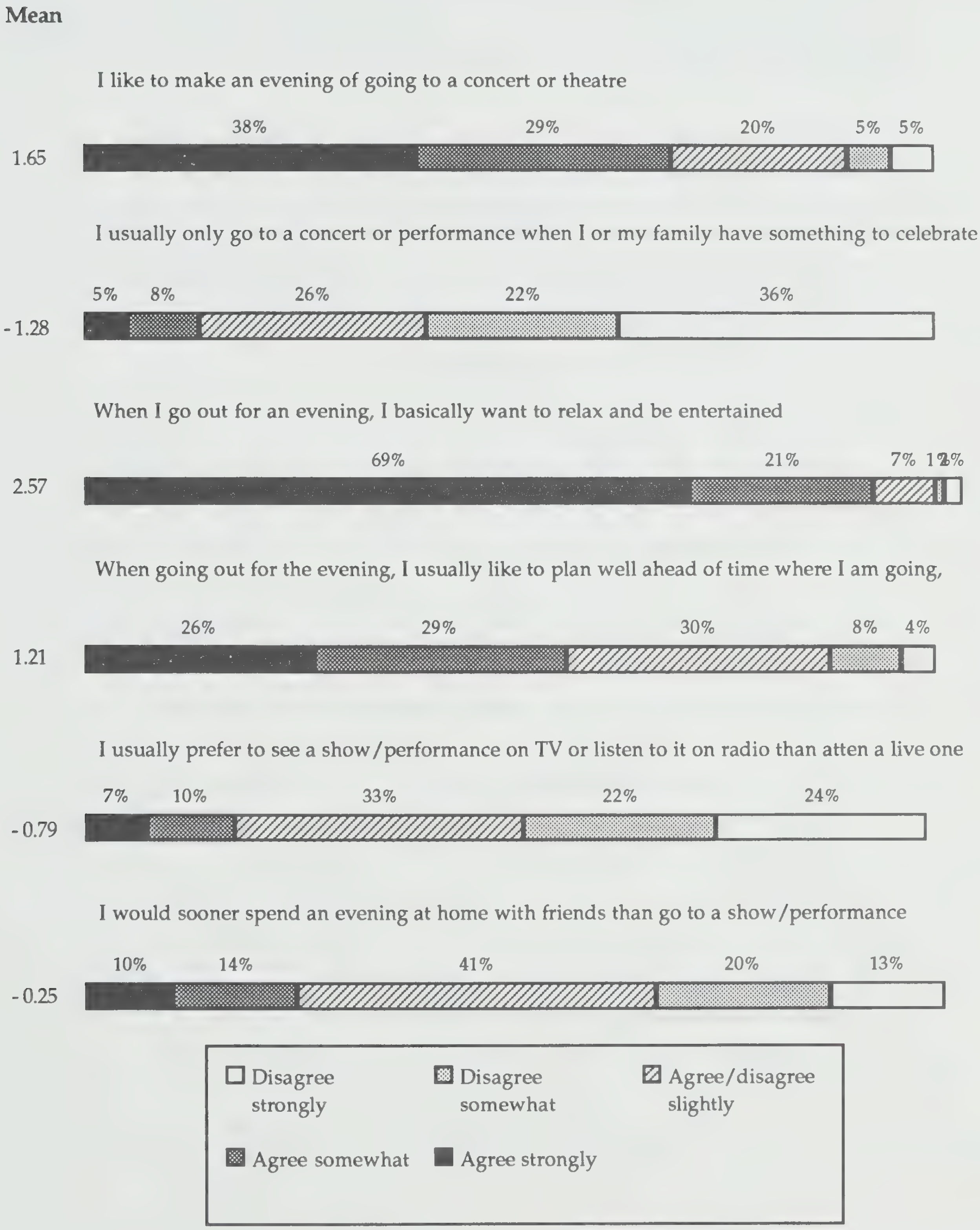
Although, as noted earlier, there is a strong interest among Canadians in going to concerts and performances, the home has its attractions. Table 2.21 indicates that 46% reject the position that they would prefer to experience performances on TV or radio than live, meaning they prefer to see performances live. The remainder of the population are largely undecided on this issue. However, the attraction of home entertainment is even more strongly observed when a show or performance is placed in competition with an evening at home with friends. Only one-in-three strongly or somewhat disagree and indicate that they would sooner go out to a concert. Another four-in-ten are relatively undecided, being either slightly in agreement or disagreement. This group could then be swayed either way. The desire to attend a concert live is thus countermanded by other pressures to stay at home.

Moreover, those who have not attended a Traditional performing arts performance in the last six months, but show an interest in attending more performances, express quite strong stay-at-home sentiments. Thus, for example, only 32% of those who have never been to a Traditional performing arts performance, but express interest, reject the idea of preferring performances on TV or radio to live performance; this compares with 61% rejecting the home based position among their counterpart recent attenders. Presumably, one of the reasons this group of non-attenders have not attended is because they have some "stay at home" preferences.

There are a number of demographic variations to the context statements. Women, throughout the data tend to express more positive attitudes toward the arts, and especially the performing arts. In this instance, women are more likely than men to strongly agree that they like to make an evening of going out (41% versus 33%). Higher income and better educated Canadians are also more likely to indicate this, and in addition aremore likely than others to reject the stay at home position. Possibly, because of greater opportunity, those Canadians living in larger urban centres are much more

Table 2.21

CONTEXT FOR AN OUTING



likely than those living in communities of less than 10,000 people to indicate that they like to make an evening of going to a concert or theatre (70% versue 58%).

When the target groups are considered, those who have attended a Traditional performing arts performance in the last six months and would like to attend more frequently are more likely to say that they like to make an evening of going to a concert or theatre (48%) than those who do not want to attend more frequently, but have not attended in the last five years (34%). Similarly, recent attenders wanting to go more frequently are, not surprisingly, the least likely to adopt a stay at home position.

5.2.2 THE SETTING

While a disposition to go out or make an evening of going to a performance is an obvious prerequisite to becoming part of an audience, perceptions of the setting and the audience are also fundamental to any decisions regarding attending a performance. As Table 2.22 makes clear, most Canadians want to feel comfortable, "to feel at home and relax", when they attend a performance. In all, 72% either strongly or somewhat agree with this position. Feeling relaxed and at home does not, though, mean that Canadians invariably want to dress casually when they go out.

Some clearly do, however. Close to four-in-ten indicate that they prefer not to "dress up," while another third are undecided. A quarter disagree with the proposition and appear to have no trouble with the idea of "dressing up." The fact that only one quarter appear comfortable with this idea, suggests that this could be a considerable barrier to attendance. However, these barriers will vary by discipline. A further barrier appears to be the lack of identification some respondents have with performing arts audiences, at least with ballet and opera goers, the examples cited. However, only one quarter (26%) agree with the idea that people who go to ballet or opera are "not my type," while 41% appear to believe they are their "type". This suggests that any lack of identification with the audience is limited, although it does exist for some in the population.

When demographics are considered, the setting appears to be significantly more important to Francophones than Anglophones. Thus, 59% of Francophones, compared with 33% of Anglophones, agree with the "attending a performance in a relaxing and homey atmosphere" statement.[1] Similarly, 46% of Francophones, compared with 36% of Anglophones, agree that they prefer not to "dress up" to attend a show or performance. Francophones are also somewhat more likely than Anglophones to believe that those who prefer the performing arts are "not my type." This latter response suggests that Francophones have a more casual and relaxed approach to the performing arts, and that this may lead them to believe that certain performing arts audiences are too formal.

Much the same variations occur in terms of gender. Males are more likely than females to indicate that they prefer not to "dress up" and that performing arts audiences are "not my type." In both cases, men are approximately 10% more likely than women to disagree with each statement. These same differences also occur when community size is

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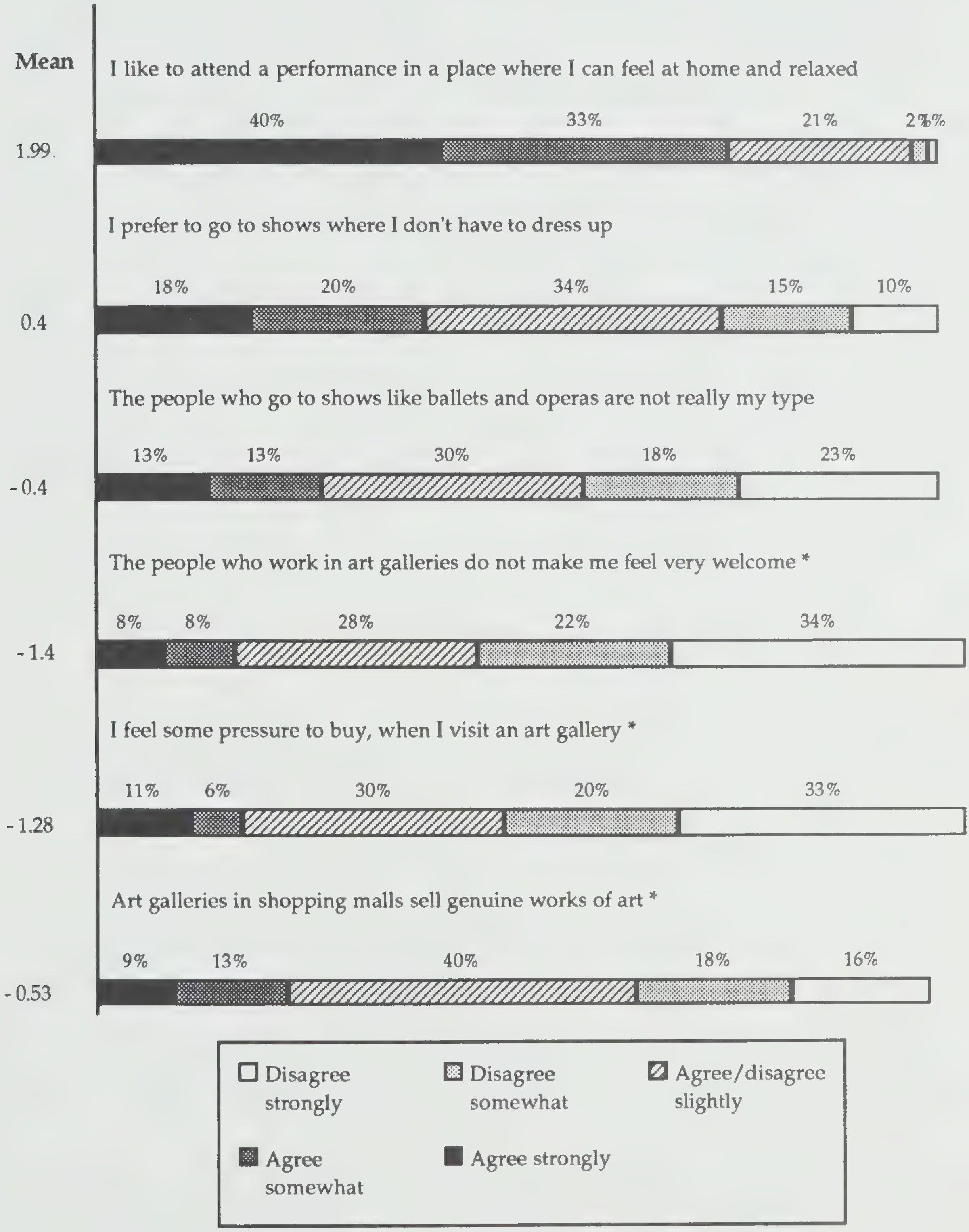
1 When Francophones are referred to, this almost entirely refers to French speaking residents of Québec. With the exception of New Brunswick and Québec, Francophones form a very small proportion (5%) of the Canadian Arts Consumer Profile general public sample.

Table 2.22

THE SETTING



** Asked in second wave only*

considered. Those in major urban centres are more likely to accept each statement, thus indicating more of an acceptance of more formal wear for attending a performance and feeling more comfortable with a performing arts audience.

This same pattern is also apparent among the various groups of attenders. Recent attenders who want to attend more frequently are much more positive toward the attire issue and toward the audience than those who have not attended recently or have never attended, but would like to. Thus, while 56% of recent attenders who want to attend more frequently disagree that the audience is "not my type," only 43% of those who have not attended in the last six months and 35% of the never attenders disagree with the position.

Table 2.22 also displays responses to three questions relating to the visual arts and crafts. These questions were asked on the second wave only and thus a complete analysis is not possible. However, suffice it to say, there is little evidence that many Canadians feel intimidated by art gallery staff. Only 9% say they strongly or somewhat agree with the statement. Similarly, only a few Canadians report feeling some pressure to buy when in a gallery. The low percentage of general public respondents declaring being purchasers of works of art may explain this relatively low level of agreement, presumably since they have very little experience with or exposure to art galleries or their staffs. Finally, it is clear that when respondents are thinking about art galleries they are rarely thinking about "galleries" in shopping malls. Only 17% agree shopping mall galleries sell "genuine works of art." Presumably, most Canadians understand, in a general way, the artistic value of works sold in different types of galleries. Chapter 5 explores these topics, further showing the relationship between various attitudes and purchase behaviour and price paid.

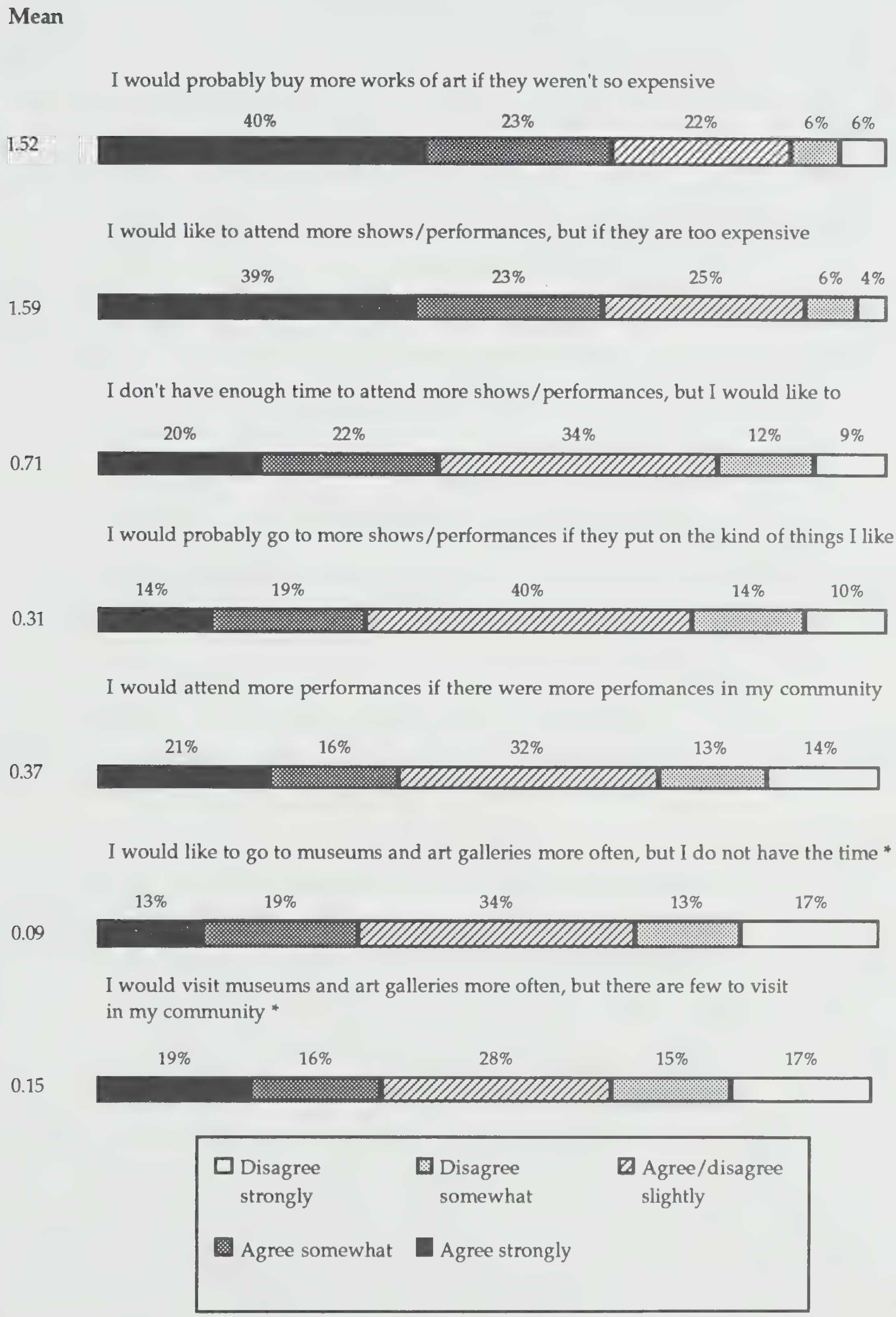
5.2.3 Constraints and Priorities

In any purchasing decision there are constraints and priorities that act to shape a decision. Purchasing tickets for the performing arts or purchasing art work is no different in this regard. The availability of time and money are two obvious constraints. As Table 2.23 points out, money is a far more significant constraint than time. For both the visual and performing arts statements, equally large numbers agree (close to two-in-three) that the expense of the product influences the frequency of purchase. Clearly there is a perception that attending performances and purchasing art work is expensive. For only one-in-ten Canadians does this not appear to be the case; and in these situations it is those who are not interested in purchasing or purchasing more frequently, who are more likely to give this type of response. Thus, for example, 54% of those who have never attended a Traditional type performance and express no interest in attending, agree they would attend if it were less expensive compared with 71% among non-attenders with an interest in attending.

Time is obviously another constraint, and appears to be a significant one, in terms of performances for only just over four-in-ten people. Time limitations for visiting museums and art galleries appear to be less than they are for attending performances. This may be explained by the longer hours of availability of visual arts and crafts points-of-access compared with the precise and once-or-twice-a-day only curtain time of the performing arts.

Table 2.23

CONSTRAINTS AND PRIORITIES



* *Asked in second wave only*

Similarly, the availability of preferred types of performances and availability of performances within the community are seen as constraints by a minority of the population.

As might be expected, there are significant community size variations on financial and time factors when demographic variations are considered. Reported financial constraints show significant variation by household income for purchasing tickets, but less so for purchasing artwork. Presumably, this indicates that, even among the more affluent, there is limited interest in purchasing artwork. In terms of ticket purchasing, while only 44% of those from households with incomes in excess of $75,000 agree the expense of tickets deters them, 70% say this among those below the $40,000 mark.

These constraints also appear especially significant among women and Francophone respondents. In all, 46% of females compared with 32% of men agree there is a financial constraint on their purchasing more tickets. Similarly, 47% of Francophones say this compared with 33% among Anglophones.

That there is great potential demand in smaller communities across the country is evident from the fact that while 25% of those in urban centres, of more than a million plus, strongly or somewhat agree that they would attend more performances if there were more in the community, 51% say this in those communities of between 10,000 and 99,000, and 62% say this in those communities of fewer than 10,000 people. In fact, 40% strongly agree with this position in smaller centres.

When life cycle variations in perceptions of price and time sensitivity are considered, it is evident that older couples, whose children have left home, indicate less price and time pressure than those at other life cycle stages. Those who have young children are the most likely to agree that they would attend more performances if they had more time (51% versus 42% nationally).

Some idea of the different priorities that compete for a consumer's dollar are found in Table 2.23. As this table makes clear, many Canadians, especially those with young families, are likely busy setting up house. In fact, 58% of respondents cite the necessity to buy other household furnishings as a bigger priority than purchasing art work.

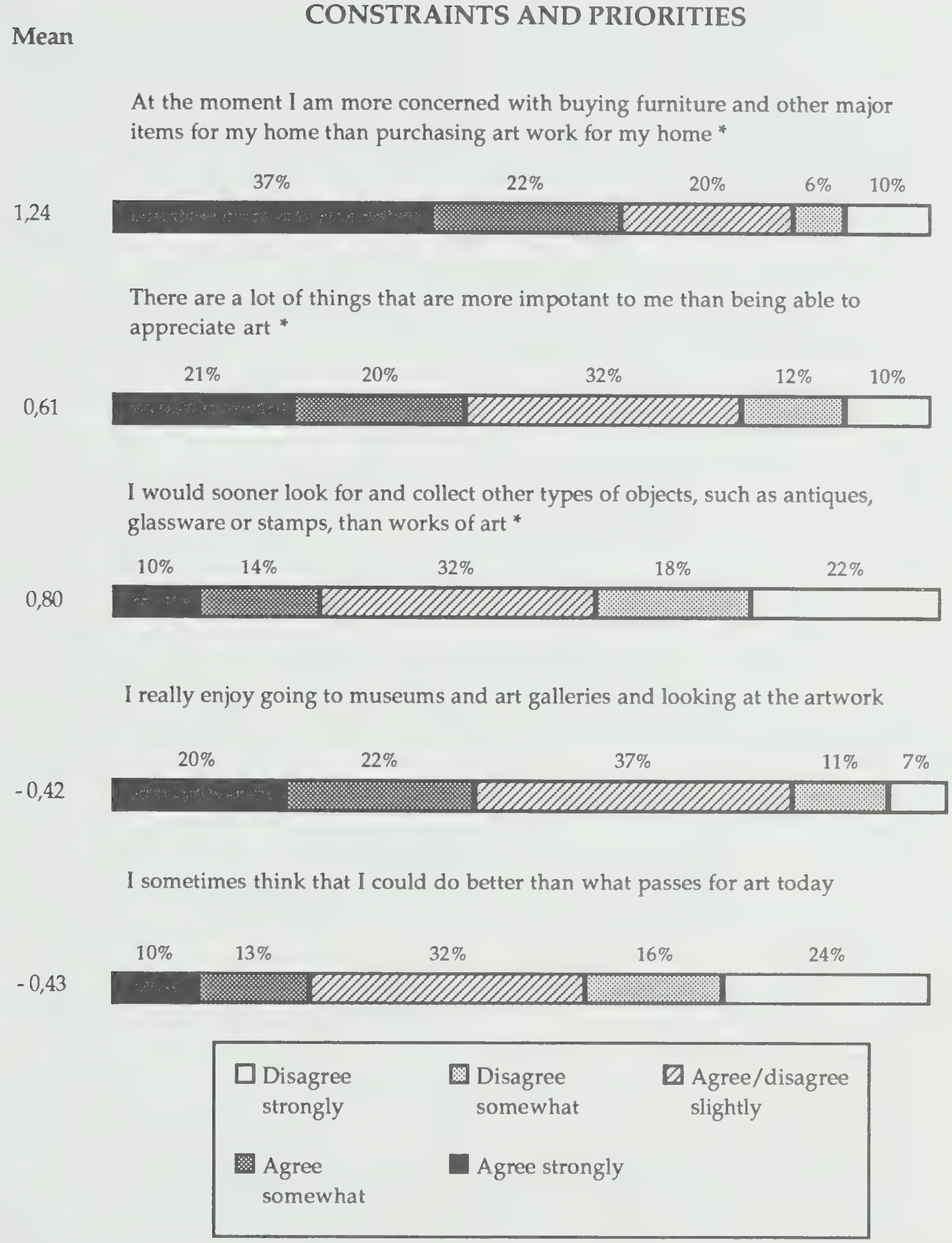
Although there are obvious constraints in people's lives that limit purchasing art products, there is still a sense for many of the importance of the arts as a priority. In all, only four-in-ten say there are more important things than appreciating art. By the same token, there is a significant minority (22%) who believe there are few things more important than being able to appreciate art. Similarly, four-in-ten indicate that they really enjoy visiting museums and art galleries, while only 8% disagree.

In terms of attitudes toward purchasing art, these are quite positive. In all, only a quarter agree they prefer collecting other objects than art work, while a significant 40% disagree. Presumably, while price may act as a barrier to purchasing art work, this does not mean that other forms of collecting are necessarily taken up as a substitute.

There may though be something of a barrier in terms of respect for the product, as Table 2.23 notes, 29% agree that they could do better than what passes for art today. This group who could, however, represent less than a third of the population may be defined as those perhaps not respecting the skills of artists.

Table 2.23 (cont'd)

CONSTRAINTS AND PRIORITIES



* *Asked in second wave only*

5.2.4 Likes and Dislikes

The attraction of star performers is obvious from Table 2.24 In all, close to two-in-three respondents say they like to see star performers in person. Fewer, but a still significant number, also indicate that they like to see shows that have been "hits." At the same time, there is some demand for shows that are unique and out-of-the-ordinary. Close to four-in-ten express interest in this latter type of production.

Few respondents admit to finding stage plays "boring" or that live arts performances require too much concentration, and in fact a majority (53%) reject the "boring" statement, while close to a third are relatively undecided.

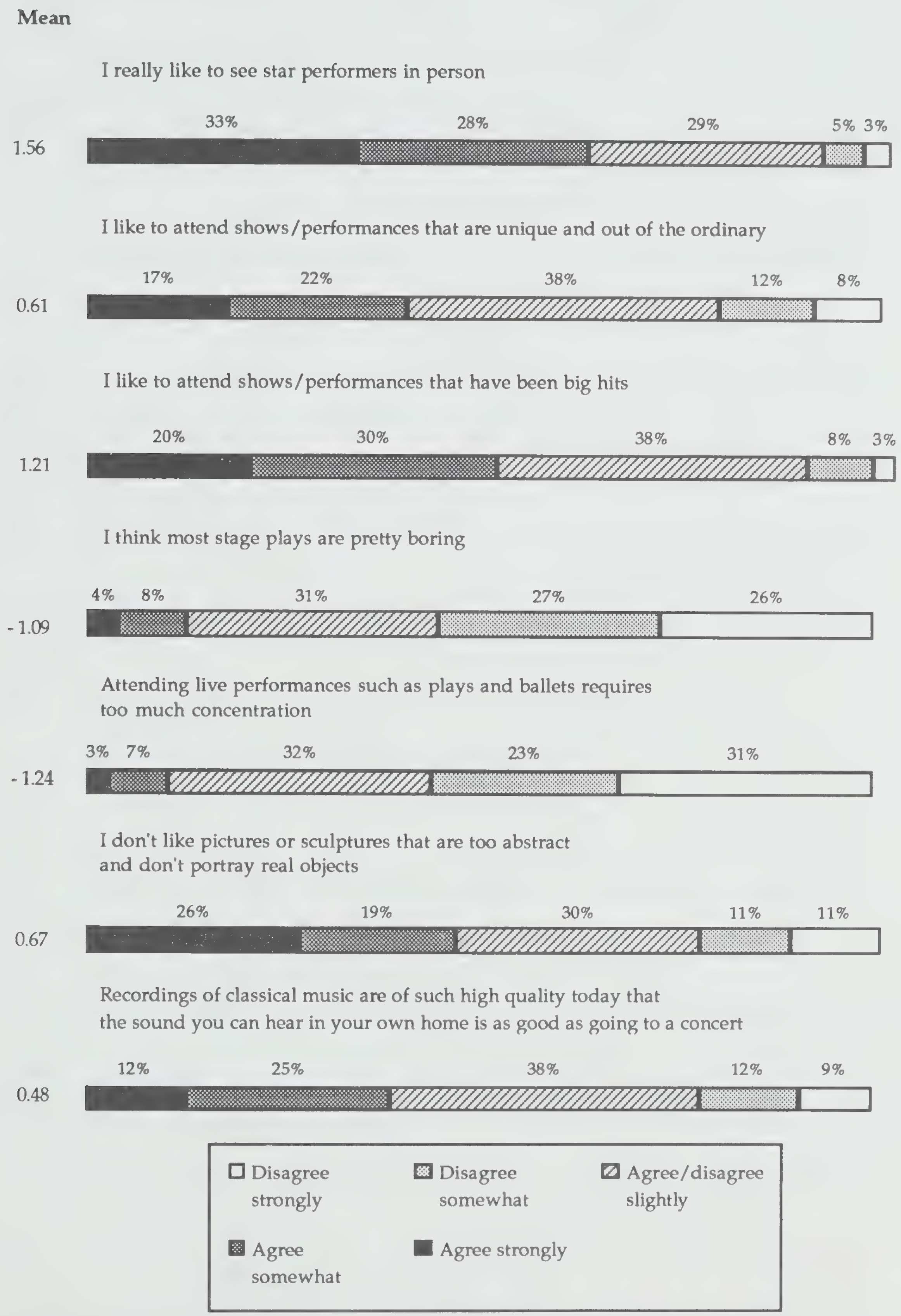
In terms of the general public's aesthetics, there is some sense that abstract imagery is less appealing. Fully 45% of respondents take this position, while a further 30% are undecided. Clearly, despite a half century or more of abstraction, a significant body of public opinion has not been won over to abstract images.

Recent advances in sound recording, though, do seem to be having an impact on some Canadians' views regarding the differences between recorded and live performances. Nearly four-in-ten agree that recordings of classical music are of such high quality that home listening is as good as can be heard in a concert hall. Interestingly, only 21% of the population disagree with the position.

While, as noted earlier, Anglophones appear to take a more formal approach to their performing arts attending, Francophones appear to like shows that are more unique and unusual. In all, 48% of Francophones, compared with 36% of Anglophones, agree with this position. Linked to this, is the fact that Francophones are somewhat more likely than Anglophones to believe that most stage plays are boring and that attending arts performances such as plays and ballets requires too much concentration. On the issue of stage plays being boring, 55% of Anglophones disagree with this position compared with 48% among Francophones. Similar percentages are found for the concentration statement. On these latter two points, women are also more likely than men, by approximately a 10% margin, to reject the idea of stage plays being boring and that performances require too much concentration. Similarly, recent attenders of performances who want to attend more frequently are much more likely than their counterparts who are less frequent attenders to reject both positions.

Table 2.24

LIKES AND DISLIKES



5.2.5 USES AND VALUES ATTRIBUTED TO THE ARTS

Canadians show a rather mixed set of attitudes regarding the uses and values they are prepared to attribute to the arts. As Table 2.25 shows, a number of statements receive strong support, while for others, support is quite weak. Respondents appear largely undecided about several statements.

In detail, there appears to be quite strong support for those statements dealing with art as experiential and capable of taking one out of oneself. Hence, half the population agree that "art gives me a lift from everyday experience." A similar number accept the "historical record" idea of art. Namely, that since art reflects what life is like in a given time it is an important part of the history of a country (48%). There is also some support for the idea that the arts in Canada are one of the things that makes Canada unique and different from other countries (53%); only 11% strongly or somewhat disagree with this position.

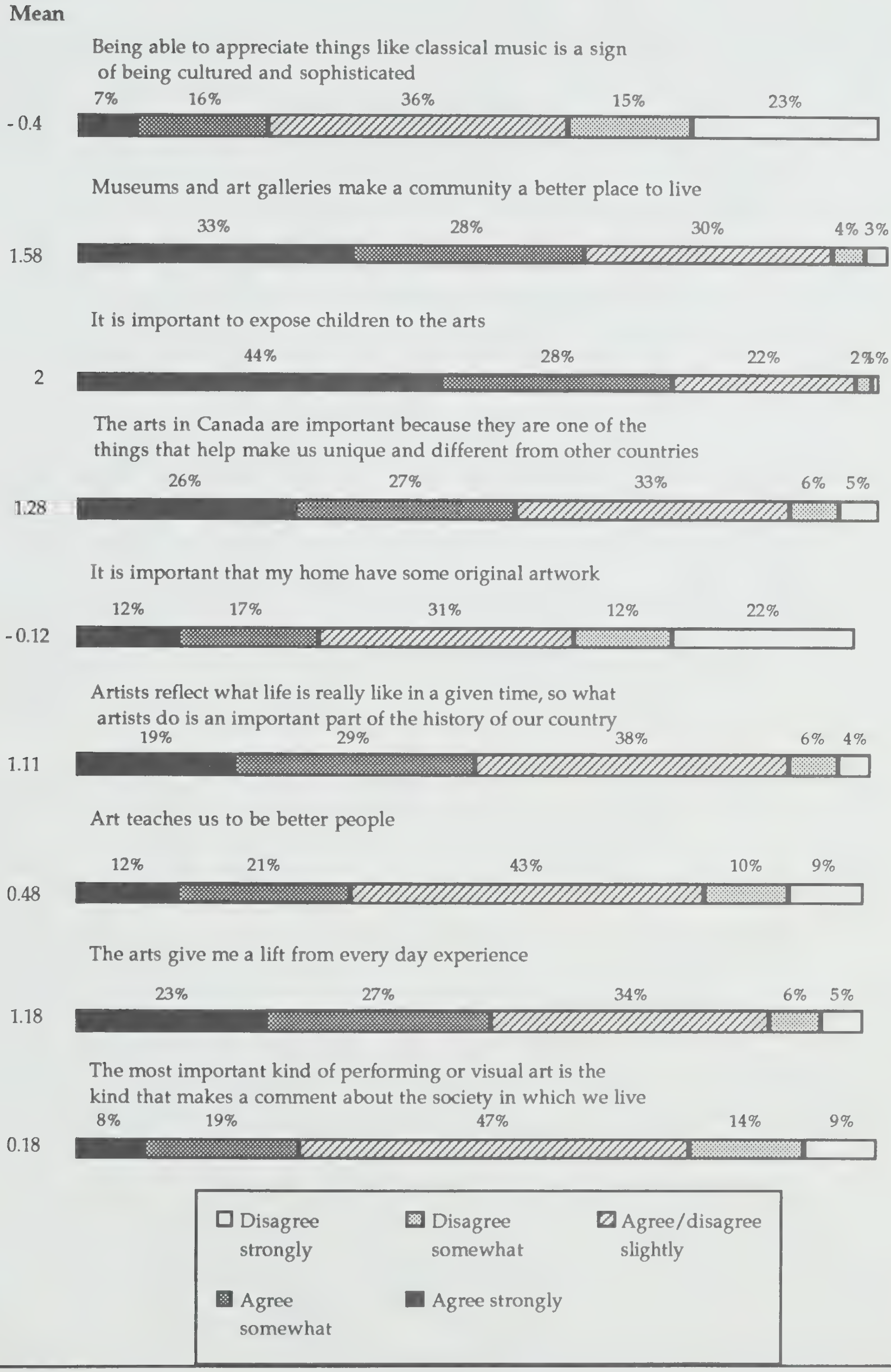
While there clearly are a number of uses and values that Canadians are prepared to attribute to the arts, that they are a sign of being cultured and sophisticated is not one of them. As Table 2.25 shows, only 22% of respondents indicate that they agree with this position, while 38% clearly reject this point of view. There is also limited credibility given to the position "that art teaches us to be better people," one-in-three subscribe to this point of view. However, as with a number of statements that receive limited support, this proposition is not rejected either, only 19% say they disagree with the proposition. A plurality (43%) simply appear to be unsure about this value. At the same time, few (only one-in-five) appear to accept the idea that social comment is the most important type of art. Also of limited importance is the idea of art as important in the home, although almost one third of respondents agree that it is important that their home have some original art work. Again, neither the social comment nor art in the home propositions are rejected, Canadians simply have weakly held views or are unsure of their position on these issues.

Two propositions about the value of art, however, receive fairly substantial agreement. The first is that museums and art galleries make a community a better place in which to live. Close to two-in-three respondents agree with this position (63%). An even larger proportion (72%) agree that children should be exposed to art. This is the second most agreed to statement in the whole agree/disagree battery.

The fact that the museum in the community and children and art statements receive such strong support, in the face of weaker support for some other values ascribed to the arts, is powerful evidence of the weakness of the arts in Canada in terms of public attitudes and the challenge presented to marketers. While Canadians give importance to museums and art galleries and for the education of children, few Canadians appear to have any well developed rationale, at least in terms of the positions tested in the research, for why the arts are important. This does not imply in any way that Canadians

Table 2.25

USES AND VALUES ATTRIBUTED TO THE ARTS



are anti-art. They are not. They simply appear to be uninformed or do not have an attitude regarding some specific values and uses attributed to the arts. This also suggests that many of the values tested here, in terms of the public overall, or even audiences, have limited impact as marketing positions.

Demographic variations indicate that older Canadians are much more likely to ascribe positive values to the arts. Thus, 40% of those over 45 years, compared with 32% for the population overall, either strongly or somewhat agree that "art teaches us to be better people." Similarly, recent attenders who would like to attend more frequently are also above average in agreeing with the proposition (40%). Their counterparts who attend less frequently are somewhat less likely to subscribe to this value. The fact that six-in-ten of frequent attenders do not accept this proposition, although they do not reject it either, suggests that even among a core group of attenders who would like to attend more frequently, this is not a particularly strongly held value.

At the same time, the social comment role of art appears to have minimal impact on attenders. They are virtually the same as non-attenders in rejecting the idea of social commentary as being the most important type of art. There is, however, somewhat more appreciation for the "art as social comment" among Francophones compared with Anglophones (34% versus 24% agree).

Of more significance for recent audiences who would like to attend more frequently, is the idea of art giving a lift from everyday life. In all, 67% of recent attenders subscribe strongly or somewhat to this position compared with 56% and 44% respectively among their counterparts who have attended in the last five years or never attended. The "lift" idea also appears to be an important differentiating characteristic for those who want to attend more frequently, compared with those who do not. Taking those who have attended a Traditional performing arts performance in the last six months, 67% of those wanting to attend more frequently, compared with 48% among those who do not, agree with the "lift" statement. Clearly, going outside of everyday experience has some importance.

Similarly, the idea of art as providing a window to the past and as a document of times present and past also has some importance to audiences, especially those who would like to attend more frequently. However, the differences between types of audience is not as strong as for the "arts give me a lift" position.

One demographic variation that shows a substantial difference on the "history" item is language. Francophones are much more likely than Anglophones to agree with the position (66% versus 43%) that artists reflect what life is like.

As noted above, the idea of museums and galleries as important to the community and art as important for children are two strongly held values. This appears to be especially the case among those 35 years of age or more, and for Anglophones rather than Francophones. In the case of those 35 years of age or more, 69% and 78%, respectively, agree with the museum and children statements, compared with 53% and 67%, respectively, for those below this age. Disturbingly, though, when life cycle stage is explored, those under 45 years of age, with presumably young children at home, are close to the national average in both agreeing that museums and art galleries are important and that it is important to expose children to the arts. Those who are older, and presumably with

older offspring, and those whose children have left home are much stronger in their level of agreement. Among Anglophones, 65% and 75%, respectively, agree with the museums and children statements, while 51% and 64% among Francophones, respectively, agree.

5.2.6 VIEWS ON ARTISTS

Although, as noted, most Canadians have fairly unclear views as to why the arts are important, there is fairly substantial support for artists. As Table 2.26 shows, very few Canadians are prepared to believe that artists do not care for their audiences. But, there is some barrier between the population and its artists, since respondents indicate that they have little to say to artists when they meet. This, though, may be simply a factor of unfamiliarity with the arts, or possible shyness when meeting "stars." Recent Traditional arts performance attenders display only limited amounts of these attitudes.

Further evidence for the continuing respect for the artist and the arts comes from the fact that over seven-in-ten respondents (71%) indicate that they believe artists make a major contribution to society. Similarly, a not insignificant proportion of the population (43%) indicate that they would "love" to be an artist.

Although views on artists appear very positive, this must be seen against the data from the previous section on values, which indicated that Canadians were unclear why the arts are important. Much the same phenomenon likely applies to the population's views on artists.

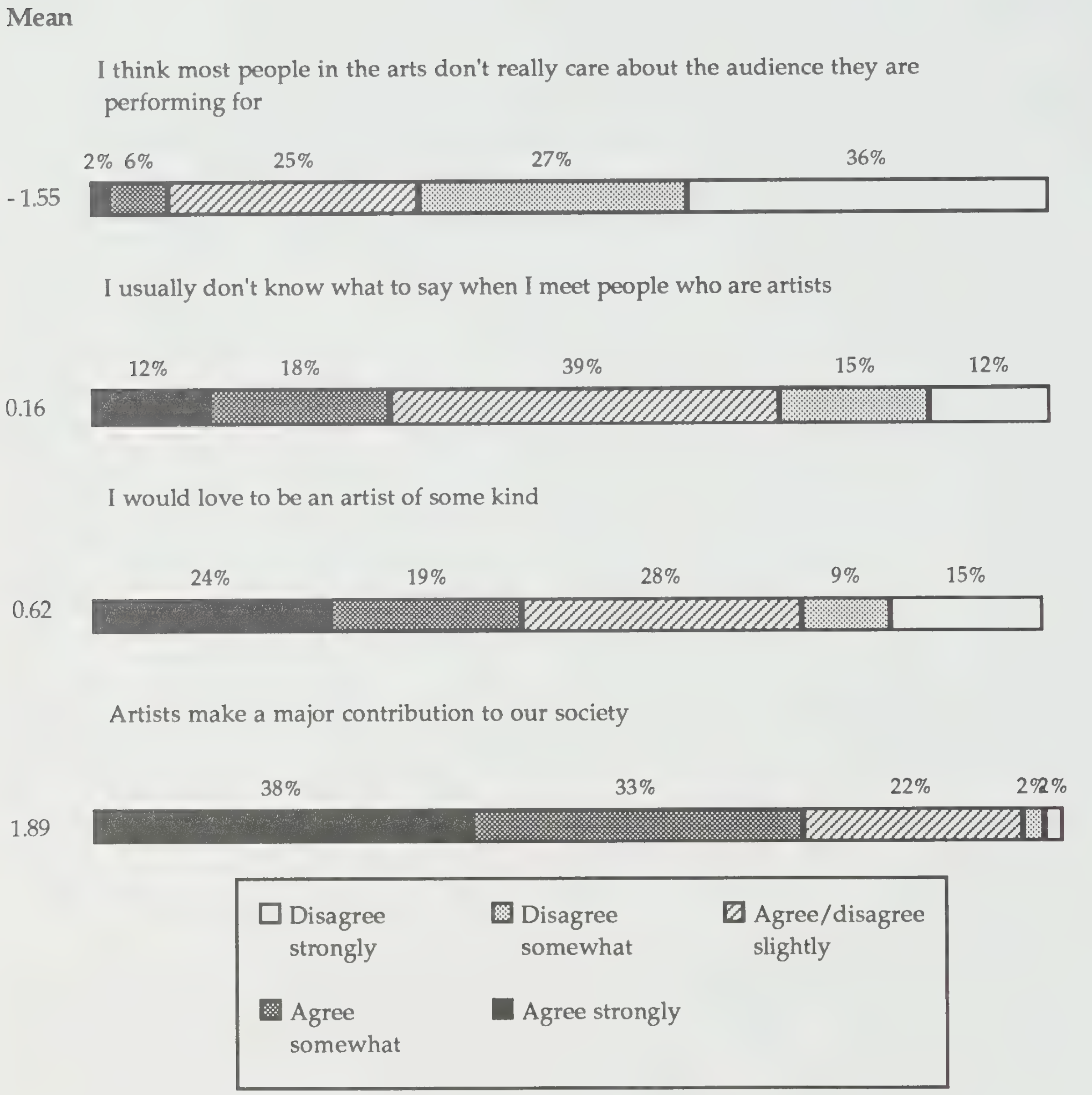
Demographically, Anglophones are more likely than Francophones to say they would love to be an artist (47% versus 33%), and to reject the idea that artists don't really care about their audience (68% versus 54%), while Francophones are somewhat more likely to agree that artists make a major contribution to society (70% versus 75%). This suggests that while Francophones appear to be somewhat more likely than other Canadians to recognize the importance of artists to a society, at the same time, they are more critical of artists, to the point of rejecting the idea of being an artist.

Other demographic variations indicate that women are more likely than men to agree that art makes a major contribution (75% versus 66%) and to agree that they would love to be an artist (47% versus 33%). The other group who say they would love to be an artist are those under 25 years of age (52%).

There is also evidence that education level has a significant impact on attitudes toward artists. Those with one or more university degrees are invariably more positive in their response. Thus, 74% of those with university credentials reject the idea that artists don't care about their audience compared with 61% among those whose education ended at high school. Similarly, while only 18% of those with a university degree say they don't know what to say when they meet an artist, 37% of those with high school share this feeling.

Table 2.26

VIEWS ON ARTISTS



Finally, those who are recent attenders of performances have more positive attitudes toward artists than others in the population. At the same time, those who express an interest in attending performances more frequently in future are also more likely to hold more positive attitudes toward artists, relative to those who say they are content with their present level of attendance. Thus, for example, recent attenders who would like to attend performances more frequently are more likely than their counterparts who express contentment with their level of attendance to agree that artists make a major contribution (79% versus 69%). Possibly, these more positive attitudes have an impact on their attendance behaviour.

5.2.7 THE NATIONAL FACTOR

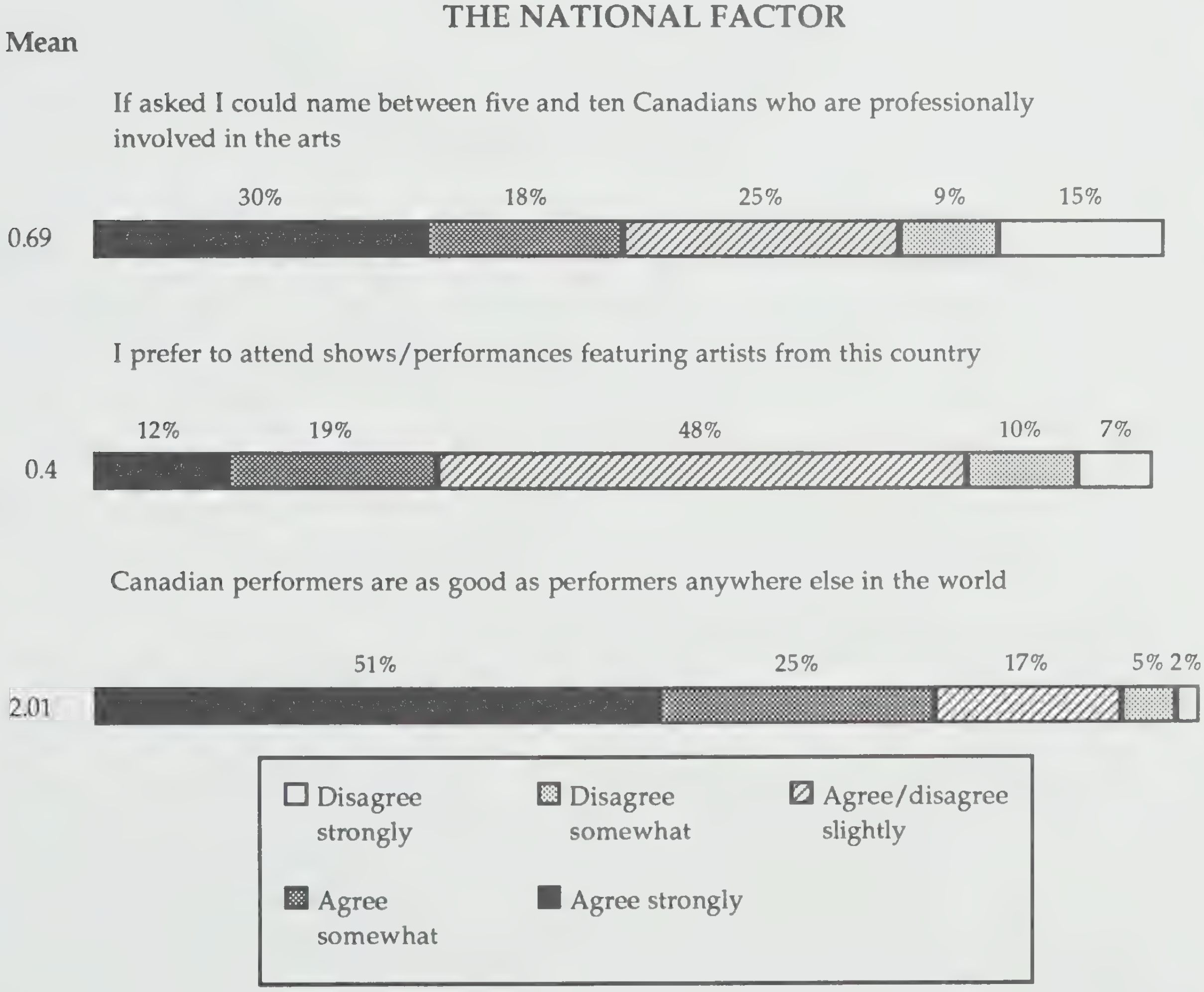
Although they are convinced that Canadian talent is as good as that of performers anywhere else in the world, most Canadians, as Table 2.27 makes clear, appear to be not especially nationalistic in their support of Canadian artists. Only just over a quarter indicate that they would prefer to see shows/performances featuring Canadian artists, a plurality are unsure. Despite this, a substantial minority of the population believe they could name five to ten professional Canadian artists.

Not unexpectedly, there are important differences by language on the issue of Canadian arts and artists. Francophones on all three questions are much more likely than Anglophones to indicate that they can name artists (71% versus 40%), that they prefer to see Canadian artists (45% versus 24%), and that Canadian performers are as good performers anywhere (67% versus 45% say they "strongly" agree).

Presumably, this is further evidence for a strong sense of pride that Francophones have in their artists, relative to Anglophones, and presumably the high level of expectation they have regarding the arts community.

Table 2.27

THE NATIONAL FACTOR



Young Canadians, those under 25 years of age, are the least likely to say they can name five or ten Canadian artists (39%), while those 45 to 64 years of age are the most likely to agree (52%) that they can name Canadian artists. At the same time, those under 45 years of age also display less of a nationalistic orientation regarding attending performances. In all, only 24% of this age group, relative to 35% of those above this age, agree that they prefer to see Canadian artists perform.

When attendance patterns are considered, not surprisingly, recent attenders are most likely to agree they can name Canadian artists (56%). However, recent attenders and others hold quite similar views on the other questions related to Canadian artists. Thus, recent attenders are no more nor less likely than others to agree that they prefer attending performances featuring Canadian artists.

6 Psychographic Analysis

6.1 Introduction

Thus far, our analysis has indicated that two thirds of Canadians report they have attended a performing arts event in the last six months. Forty six percent report that they have been to a Traditional performing arts event in the last six months, while 55% say they have been to a Popular type of performance. Furthermore, the great majority of both groups of recent attenders express an interest in attending more performances than they do at present. While this suggests considerable potential, the various types of attenders and non-attenders can be broken down into a series of segments and targetted separately. The so obtained segments are called *psychographics*.

The essence of segmentation analysis involves a multivariate technique known as cluster analysis. This technique identifies segments in a survey data set that provide similar answers across all or most questions used in a cluster analysis. The data used in the segmentation analysis consists of the attitudes toward the arts items reviewed in the previous section of this chapter. Further details of the technique are found in the Technical Appendix.

The tables describing the mean scores for each segment on the items reviewed in the previous section are found at the end of this section. Additional results referred to in the description of each segment also follow this section in a series of tables.

6.2 Introducing the Segments

The model that best fits the data consists of eight distinct segments. These are shown in Table 2.28. Two segments appear reasonably and consistently disposed toward the arts and are fairly frequent attenders. These segments make up approximately 25% of the population. Two segments also have reasonably positive attitudes, but their attitudes do not translate into the same level of reported behaviour. They appear to be more "mainstream" in their performance taste. Segments five and six are less positive and their reported behaviour reflects this. Segment seven is made up largely of pop/rock fans, while segment eight types display no interest in the arts and little interest in involvement in the arts.

Table 2.28
General Public
PSYCHOGRAPHIC SEGMENTS: VALUES TOWARD THE ARTS

	SEGMENT LABEL	% OF POPULATION
1	Devoted	8
2	Believers	17
3	Practitioners	14
4	Conditionals	18
5	Uncommitted	14
6	Uninvolved	17
7	Carefree Pop/Rockers	6
8	Tuned Out	6

In the sections to follow each segment is described separately. Tables describing variations by segment in response to the statements about the arts, as well as major demographic and attendance pattern variations, are found at the end of the section.

6.2.1 DEVOTED

This group, which represents 8% of the population, love the arts and attend arts performances frequently. In fact, attending performances is an important part of their lifestyle. They typically scored highest on most of the statements in the segmentation battery. In addition to being regular attenders of performances, they would go more if they could afford it. Time does not appear to be a constraint, although money is. This segment appears to plan their activities ahead of time, though not to the same extent as some other segments.

As frequent attenders, the Devoted group appears to like the experience of getting out of the house. They also appear knowledgeable, being the most likely to agree they could name Canadian artists. They do not necessarily believe that the arts bestow any special "humane" qualities on people or will necessarily make the world a better place, but they do believe the arts play an important role in helping to define and make Canada distinct. They are less sure that the arts are important because of their ability to make a social comment.

Consistent with their interest in the arts, while interested in "stars", the Devoteds' interest is weaker than other segments, and they are also less concerned with seeing shows that have been "hits." They have some, but not much interest in the unique or unusual. The Devoted are comfortable with artists, and believe the artist's role is very important, but they are not sure they wish to be artists themselves.

In terms of demographics, the Devoted have somewhat above average incomes, while 36% of this core group have household incomes in excess of $50,000, 29% do among the general public sample overall. This segment is highly educated: 36% have at least one degree compared with 20% among the population overall.

This segment also tends to be female more than male. While the sample is divided equally by gender, the Devoted segment is 61% female. They are also slightly more likely to be Francophone than Anglophone.

The Devoted largely live in major urban centres: 44% live in one of the three major cities compared with 33% among the sample. They are also older rather than youthful, 45% are between the ages of 35 and 54 years, compared with 38% among the sample, while 20% are over 54 years compared with 16% for the general public overall.

This segment is as likely as other Canadians to be in the labour force, however, fully a third work in the health care or education field, compared with 20% for the general public overall.

In terms of attendance activities, as noted, the Devoted are frequent attenders of performances. Over a third (36%), compared with 20% among the population overall, say they attend at least five concerts or performances a year. At the same time, some in this segment also appear to enjoy visiting clubs to see performers. Close to three-in-ten report such outings at least five times a year. The Devoted are also movie fans, with over four-in-ten saying they go to the movies at least five times a year. This segment expresses a strong interest in attending more performances. While 73% say they have attended a Traditional arts performance in the last six months, 67% say they would like to attend more frequently and only 6% say they are content with their level of attendance. Nearly as many (68%), though, report attending a Popular arts performance during the same time frame and 59% say they would like to attend these types of events more frequently. The Devoted are fairly eclectic in their tastes, and while the traditional arts are clearly their first love, they attend and express interest in attending more rock and pop performances. They also express some interest in jazz. Their main interests in the performing arts, though, are in theatre and classical music.

This segment also appears to be interested in and to purchase visual arts and crafts. They are the most likely segment to agree that they enjoy going to museums and art galleries. They are also the most likely to agree that museums and art galleries make a community a better place to live. In addition, four-in-ten indicate that they have purchased both art and craft works in the last two years, and half of this purchasing group express an interest in purchasing more art and craft work within the next two years. They have the strongest level of interest of all segments in abstract imagery.

Finally, the Devoted segment recalls being exposed to the arts as a child, although some other "arts" oriented segments recall almost as much exposure. In all, close to seven-in-ten recall attending theatrical performances, while nearly two thirds recall attending various types of children's performances. Fewer recall dance and classical music performances (43% and 46% respectively).

In terms of other childhood activities, close to half (47%) recall visiting museums on a regular basis, and this is a higher proportion than other segments, although fewer (24%) among the Devoted, just as fewer among the population overall (15%) recall regularly visiting art galleries. In addition, the Devoted segment, together with the Believers segment, are generally the most likely to recall that they regularly took lessons or classes in the various arts.

6.2.2 BELIEVERS

This segment, which represents 17% of the population, are similar in many ways to the Devoted. Their responses to the statements, though, are invariably slightly less positive, but nonetheless they are typically very positive.

Believers like to go out, and they like to make an evening out of going to a performance. They are, though, less likely to plan ahead than the Devoted and are likely to do things more spontaneously. At the same time, this segment appears to be very comfortable with the idea of dressing up for a performance. In fact, their comfort level with this idea is higher than that of the Devoted.

Unlike the Devoted, this segment likes to see "stars" perform and likes "hits"; at the same time they report that they, to some extent, like unique and unusual material. Money seems to be less of a constraint for this segment in terms of their attending performances, although time appears to be more of a constraint, as is access and availability.

Unlike the Devoted segment, Believers tend to believe, more so than any other segment, in the power of the arts to forge better people. They are the most likely of all segments to agree that art teaches us to be better people. They also believe the arts have a social role to play. Possibly this belief in the importance of the arts from these perspectives accounts for their strong desire to be an artist. They also appear to be very comfortable in the company of artists.

This segment, in addition to a possibly "romanticized" view of the arts, also views the arts in highly nationalistic terms. Believers are the most likely segment to believe Canadian artists are as good as artists anywhere and are among the most likely to say they would prefer to see Canadian artists perform.

Demographically, this segment are younger than the population overall: 47%, compared with 42% among the population, are below age 35 years. They are also above average regarding their education, 32% have a university degree. This is well above the 21% for the population, but below the Devoted (36%).

Consistent with their youth, this segment tends to be childless, (32% versus 23% in the population) although they are as likely to be in a relationship as others. They are somewhat more female than male (54% versus 46%).

Believers are not as likely to be concentrated in the major urban centres as the Devoted, but are largely urban with 79% living in communities of over 100,000 people, compared with 70% for the population overall.

Most are employed, although a significant 17% are students. Those with jobs come from no one particular sector of the economy. There is, though, some slight tendency for them to work in the tourism/hospitality/media/advertising field (15% versus 11% nationally).

In terms of attendance patterns, Believers are the second most likely group, after the Devoted, to attend performances of various kinds. A third (32%) have attended at least five performances in a facility over the last year, while a quarter (26%) have attended at least the same number of performances in a club or bar. They also enjoy movies: close

to half (47% – the largest proportion) report going to a movie at least five times in the last year.

Believers' interest is somewhat more heavily oriented toward the Popular performing arts and somewhat less oriented toward the traditional than is the case among the Devoted. For both types of performances, a large proportion have attended in the last six months. For the traditional arts they are, next to the Devoted, the largest group of attenders, while they are the largest group of attenders to the Popular performing arts. This group attend a wide variety of performance types, and they are second only to the Devoted in this regard. There is, however, a tendency for the Believers to prefer the more contemporary arts. They are among the most likely to have attended contemporary dance performances and experimental theatre. Their strongest interest in the Traditional performing arts is the theatre, both drama and comedy. They also tend to reject some types of performing art. Unlike the Devoted segment, this group indicates only limited interest in opera and chamber music. Consistent with their attraction to "hits," they report a strong interest in musicals and in symphonic "pops." This is a strong crossover segment. They show an above average interest in pop music. In fact, their interest in pop music is as strong as their interest in theatre. They also have an interest in jazz.

Like the Devoted, Believers have an appreciation for the visual arts and crafts, although it is marginally weaker than the first segment. They enjoy going to museums and art galleries and believe they are important in making the community a better place in which to live. And, like the Devoted, they have an interest in abstract imagery. A significant proportion (close to a third) have purchased art (36%) and craft (30%) work in the last two years and just under half express a strong interest in purchasing more art and craft work in the next two years.

As in the case of the Devoted, a high proportion of Believers recall being exposed to the performing arts as children. In fact, their level of recall is quite similar to that of the Devoted. The main exception is a somewhat higher proportion recalls attending dance performances as a child (51% versus 43% among the Devoted). Similarly, Believers are in some cases more likely than the Devoted to recall regularly attending various types of performing or visual arts and crafts classes.

Again, like the Devoted, and all other segments, Believers are much less likely to recall visiting art galleries regularly as a child, relative to visiting museums.

6.2.3 THE PRACTITIONERS

This segment, which accounts for 14% of the population, do attend performances, although with less frequency than the first two segments. They, however, have far less awareness about the arts and can offer little by way of rationales as to the importance of the arts. In other words, a performance probably offers an evening out for these practising agnostics.

However, while they may look like other members of a Traditional performing arts audience, Practitioners do not feel as at home with the audience as the Devoted or Believers. While 54% and 49% respectively of the Devoted and Believers strongly disagree that people who go to shows like ballet or opera are not really my type, only

28% of Practitioners strongly reject this position. Given that they attend performances less frequently than the first two segments, the Practitioners treat going to a performance as more of an event. It is more likely to be associated with celebrations, i.e., birthdays, anniversaries. Since it is viewed more as a special event, this segment does not mind dressing up for the occasion.

At the same time, Practitioners also do not feel at home with the arts. They say they are unable to name Canadian artists, nor do they appear to see any greater purpose to the arts than an evening's entertainment. Thus, for example, they do not agree or disagree that the arts make a unique contribution to Canada, nor that we can understand our society better through the arts. They do not especially believe that attending a performance gives them a special "lift" from everyday life. That they reject the social comment role of the arts is consistent with their other attitudes toward the arts. This segment, while believing artists make a valuable contribution to society, as indicated above, appears to be unsure as to why.

Consistent with the above, Practitioners feel somewhat uncomfortable in the company of artists, and also consistent with the above, do not want to trade places with artists.

This segment also appears to have fairly conventional tastes, they are not comfortable with abstract images in visual art, nor are they especially attracted to stars, or the unique and unusual. They do, though, appear to like to attend "hit" shows.

Neither money, time, nor access appear to be critical barriers for this segment. Demographically, this segment is closest to the overall demographics of the population. They are average in terms of age, where they live, their life cycle stage, their employment situation and the sectors of the economy in which they are employed. They are, though, slightly above average in terms of income and education. Like the first three segments, they are somewhat more likely to be female than male (57% versus 43%).

Practitioners attend performances of various types with less frequency than either the Devoted or Believers though they attend more frequently than the other types. One-in-five (21%) say they attend performances in a facility at least five times a year. They are less likely to attend performances at a club or bar, although a substantial minority (35%) report attending at least five movies in the last six months.

Despite a generally less positive orientation toward values associated with the arts, as per their responses to the value statements, a substantial proportion (55%) report that they have attended at least one Traditional type performance in the last six months. Similarly, a substantial proportion (61%) report attendance at a Popular event. In both cases, large proportions say they would like to attend more frequently. The desire to attend more frequently is, as distinct from the first two segments, likely a desire to get out for an evening and be entertained, rather than a search for a specific "art" experience.

The somewhat less positive attitude toward the arts generally is also apparent in terms of Practitioners' views regarding the visual arts and crafts. Practitioners are much less likely than the first two segments to agree that they enjoy going to museums and art galleries and to agree that such places make a community a better place in which to live. These attitudes are also reflected in their purchasing behaviour. Less than three-in-ten

report purchasing either art or craft work in the last two years, and the majority of purchasers say they are unlikely to purchase art or craft work in the next two years.

Just as they report sligntly lower levels of attendance at Traditional and Popular performing arts events, fewer Practitioners are also likely to recall attending performances as a child. However, six-in-ten (61%) do recall attending theatrical performances. As with the first two segments, a substantial proportion of Practitioners recall visiting museums and learning a musical instrument or singing in a choir as a child.

6.2.4 THE CONDITIONALS

This segment, comprising 18% of the population, like Practitioners attend performances. They are, though, something of a puzzle, in that unlike other segments their attitudes are not always consistent, nor do their attitudes appear to be consistent with their behaviour. This either suggests that this segment indeed has conditional or conflicting attitudes or that a portion of this segment includes an unusually high number of congenial "yea" sayers, that is, respondents who have a tendency to say they agree with a statement irrespective of its content. Any "yea" saying is limited, though, since the Conditionals do, at times, disagree with particular positions.

This segment appears to attend performances of various kinds as regularly as Practitioners, although their focus tends to be more on the Popular performing arts than on the traditional.

The Conditionals are nearly as likely as the Practitioners to say they like to make an evening out of going to a performance. However, they are more likely than the first three segments to use the event for celebratory purposes. At the same time, they are among the most likely to say they want to relax and be entertained. They are also the most likely to agree that they like to attend performances in a place where they can feel at home. In fact, this segment's thoughts about evenings out are simple: "keep it casual." Consistent with this position, they are among the most likely to agree that they prefer not to dress up when attending a performance. They also are much more likely, relative to the first three segments, to agree that traditional arts audiences are not their type. Despite appearing to attend various types of performances as frequently as the Practitioners, this segment does not have the enthusiasm for live performances that mark the first three segments. They are also easily more likely than these segments to agree that they would sooner see a performance on television than live and to say that they would sooner entertain at home than attend a performance.

Although this segment's focus is on a casual evening out in relaxed settings, they are the most likely of all segments to agree that they like to plan their outings well ahead of time.

Despite some lukewarm attitudes toward going out to performances and shows, the Conditionals are among the most likely to indicate that their attendance behaviour is conditional upon money, time, availability, and the type of product available. In all cases, this segment is among the most likely to agree that these are constraints on their attending more frequently. That this segment would actually increase their level of

attendance if money, time, and availability constraints were removed is, however, questionable.

In terms of the types of performance the Conditionals are likely to enjoy, this segment is the most likely to agree that they like to see stars in person, and that they like shows that are unique and unusual. In other words, "don't bore me." In fact, this segment is among the most likely to agree "most stage plays are boring." However, despite claiming to enjoy the unique and unusual the Conditionals probably do not enjoy entertainment that strays too far from the familiar and popular. Some slight evidence of this comes from their response to the question of enjoying abstract imagery. The Conditionals are the most likely to agree they do not like abstract images and they are also among the most likely to say that they like to see shows that are "hits." Presumably, if the show has been endorsed by popular acclaim they are attracted to it. This suggests that the Conditionals enjoy performances that straddle the Traditional and Popular performing arts and enjoy mainstream type performances.

Furthermore, while they appear to like their performing arts on the light side, this segment does support some of the values attributed to the arts, although this support may be "lip service." Thus the Conditionals are second only to the Devoted in believing that the arts help make Canada unique and different and that the arts reflect social life and have an importance because of this. They are also among the most likely to believe that art teaches us to be better people, and that the arts give a lift from everyday life. Finally on this theme, they are the most likely to agree about the social comment role of the arts. These views though appear in contrast to a focus on the lighter side of the performing arts and may reflect a congenial "yea" saying mentality.

This segment's support for the arts as providing a unique identity for Canada is high, and they are among the most nationalist in their support for Canadian artists. They are also among the most likely to agree that they prefer to see Canadian artists perform and to believe that Canadian artists are world class.

The Conditionals also show among the most positive attitudes toward the visual arts and crafts. They are easily among the most likely to agree that museums and art galleries make a community a better place, and to say that they enjoy going to museums and art galleries. In addition, they are the most likely to report that they would purchase more art work if it were not so expensive.

Having said this, though, the Conditionals, as noted above, appear to prefer representional imagery. They are the most likely of all segments to agree that they do not like abstract images, and this is consistent with their views on the performing arts, which tend toward the more popular forms.

In terms of demographic background, the Conditionals are equally likely to be male or female. They are somewhat older than the overall population, in fact second only to the Devoted. This segment is of approximately average income and education.

In terms of performance attendance, as noted above, the Conditionals have an attendance pattern similar to the Practitioners segment, in all aspects except one. They are less likely to report attending a Traditional arts performance. In all, 47% report attending a Traditional performance in the last six months. A majority of this group,

though, would like to attend performances more frequently. Like most other segments, theatre drama is the most frequently reported type of performance attended, but comic theatre and stand-up comedy is also quite frequently attended.

While they hold very positive views regarding the importance of museums and art galleries, this segment is far less likely, relative to the segments ahead of them, to purchase art or craft work. One-quarter or less indicate that they have purchased art (25%) or craft (18%) work. Similarly, a majority of this group indicates that they are unlikely to purchase either type of work in the next two years.

In their recalled involvement with the arts as children, the Conditionals are very similar to the Practitioners segment. That is, a majority recall attending theatrical (60%) and children's (54%) performances.

6.2.5 THE UNCOMMITTED

This segment, which represents 17% of the population, have some interest in the Traditional performing arts, although the interest is mostly in the theatre, but they attend infrequently. The Uncommitted like live performances, but when faced with a choice, many in this segment would as soon entertain friends at home. In fact, they are the third most likely segment to entertain at home.

When they do go out, the Uncommitted are not especially demanding that the atmosphere be homey and relaxed, but they do appear to prefer a setting in which they can wear casual clothes. They also do not feel comfortable with ballet and opera audiences.

The price of tickets seems to be something of a barrier influencing attendance for this segment, as does time. Availability, as an issue influencing attendance, however, appears to be less of an issue for this segment of performing arts products than for some other segments.

The Uncommitted are not especially attracted to shows that have been hits nor are they particularly attracted to unique and out of the ordinary performances, but they are among the most likely to say that they like to see star performers in person.

The Uncommitted are generally less convinced than the four previous segments regarding the importance of museums and art galleries to a community, and of the importance of the arts for children. Similarly, they are only weakly supportive of some of the values associated with the arts. Thus, they are not strongly supportive of the idea that the arts reflect a given society in time, nor do they especially subscribe to the belief that the arts help make them better people, nor that the arts give them a lift from everyday experience. This is not to say that they are negative on these positions, but they are far from being in agreement with them.

Like other segments, though, the Uncommitted tend to believe artists make a major contribution to our society, but they are not especially comfortable when they meet artists. They express, however, some interest in becoming an artist. This, however, may be a function of this segments' relative youthfulness, and the image associated with the artist, rather than any especial fondness or commitment to the arts.

Finally in terms of attitudinal characteristics, the Uncommitted are among the least likely to feel confident in naming Canadian artists and are among the least nationalistic from the point of view of preferring to attend performances featuring Canadian artists. Like other segments, they do, however, believe our artists are world class.

Demographically, the Uncommitted are younger than average, 56% are below the age of 35 years, compared with 46% among the population overall. Many are singles without children (35% versus 26% among the population overall), and a significant minority live at home (20%). The Uncommitted tend to be close to the education level for the population overall, 20% have a university degree.

In terms of their attendance behaviour, this segment is more likely to attend performances in clubs and bars than in facilities. In all, 24% report attending five or more performances a year in the former locale compared with 14% for the latter. In addition, many in this segment are quite frequent movie goers, suggesting that this segment seeks entertainment out of the house.

The Uncommitted are, as the label suggests, not especially committed to the Traditional performing arts, at least relatively speaking. In all, 40% report attending a Traditional type of performance in the last six months, compared with 56% saying they attended the Popular performing arts. However, in both cases there is a strong interest in attending more frequently.

The Uncommitted appear to attend rock music performances more than the earlier segments. Fully one third report attending a rock or pop concert in the last six months. Of the Traditional performing arts, theatre appears to be the art they have been most exposed to, with a fifth saying they have attended a drama in the last six months. They also express interest in attending more drama. Generally, though, they express more interest in attending the Popular performing arts than in the Traditional performing arts.

As noted, this segment has only limited interest in museums and art galleries. They are among the least likely segments to express enjoyment at going to museums or art galleries. However, while they appear to prefer mainstream performing arts products, the Uncommitted are one of the stronger segments in expressing a liking for abstract imagery. This, though, may be linked to their relative youthfulness. The relative lack of interest in visual art is reflected in the fact that only a small proportion of the Uncommitted say they have purchased a work of art (19%) or craft (15%) in the last year. A majority say they are unlikely to make a further purchase of art work or craft work over the next two years. Moreover, 58% and 73%, respectively, say they have never purchased an art work or craft work.

Although the Uncommitted appear to have somewhat different values and reported behaviour relative to the performing and visual arts and crafts compared with the Practitioners, their reported childhood experiences appear to be very similar. Thus, 57% report attending theatrical performances as a child, while a third (35%) report attending a concert of classical music, and 49% report learning a musical instrument.

6.2.6 THE UNINVOLVED

This segment, which represents 14% of the overall population, has some of the least positive attitudes toward attending performances and toward the arts generally; they are second only to the Tuned Out in their limited attendance at performances.

The Uninvolved do not appear to be especially receptive to live performances. They would prefer to see a show or performance on television rather than live, and would also sooner spend an evening with friends than go to a show or performance. Possibly, because they do not attend many performances, they are the most likely to say they plan well ahead of time for the event.

When they do go out they seek a homey and casual environment. They are the most likely segment to say they like to attend a performance in a place they can feel at home and relax. Similarly, they are also the most likely to agree that when going to performances they prefer not to dress up. In addition, this segment expresses the least level of comfort with Traditional performing arts audiences.

Money, and to a lesser extent, time and availability, appear to be factors constraining more frequent attendance among the Uninvolved. Or at least this segment agrees they are barriers to more frequent attendance. Like the Conditionals and Uncommitted, the Uninvolved are among the most likely to agree that they like to attend shows that have been big hits. They are also among the most likely segments to say that they like seeing star performers in person. They are not, however, especially attracted to the unique and unusual.

Part of the limited attendance reported by this group in terms of the Traditional performing arts appears to stem from the fact that this segment is the most likely to agree that "most stage plays are pretty boring." This feeling may be linked to another belief of this segment, namely that plays and ballets, and other Traditional type performances require too much concentration.

In terms of the values and uses they attribute to the arts, the Uninvolved are quite similar in their attitudes to the Uncommitted. They tend to accept in a limited way that the arts contribute to Canada's uniqueness, and that art is important for the window on the past and present it provides. The Uninvolved are different in their attitudes, though, in two vital ways, which may affect attendance. They are much less likely than the Uncommitted to agree that art helps make them better people and that art provides a lift from everyday experience.

A further sign of this segment's lack of involvement with the arts comes from the fact that the segment is easily the least likely, excepting the Tuned Out, to say they would love to be an artist. Despite their relative lack of involvement with performances, the Uninvolved are the most likely to say they prefer attending performances featuring Canadian artists and among the most likely to believe that Canadian performers are world class.

This segment is somewhat less educated relative to the population overall and their income is somewhat below average. This may well be related to the fact that the Uninvolved live disproportionately in smaller cities and communities across the country. Fully 41% live in communities of less than 100,000 people. It may well be this situ-

ation that, in part, explains this segment's limited attendance, especially relative to the Traditional performing arts.

As noted, the Uninvolved report that they attend fewer performances than any other segment, excepting the Tuned Out. Thus, only 10% report attending at least five concerts in a facility in the last year. However, in terms of attending performances at clubs and bars, the Uninvolved are similar to some other segments, notably the Practitioners, Conditionals and Uncommitted. Their lack of attendance also extends to movie theatres. Only 25% of the segment reports attending five or more movies in the last year.

This group's interest in the performing arts runs much closer to the popular than the traditional. Only 32% report attendance at traditional events in the last six months compared with 49% reporting attendance at popular events.

In addition to limited interest in the Traditional performing arts, the Uninvolved also have limited interest in the visual arts and crafts. Only 16% and 13%, respectively, report purchasing art or craft work in the last year, and few of this purchase group say they are likely to buy in the next two years.

Consistent with their limited interest in the Traditional performing arts, the Uninvolved reported childhood recall of Traditional performing arts attendance is the lowest, excepting the Tuned Out. Similarly, very few in this segment report regularly visiting museums and art galleries, or taking classes related to the performing arts.

6.2.7 The Carefree Pop/Rockers

This segment, one of the smallest (6%), is comprised of rock and pop fans. They are also young, with 70% under age 35.

The Carefree Pop/Rockers enjoy going out to concerts, although these appear to be mainly pop and rock performances. They would sooner see a concert live than at home on TV and would sooner attend a concert than have an evening at home with friends. Not unexpectedly, they prefer locales in which they can feel at home and relax, but they are not opposed to dressing up to attend a show; for them, dressing for rock concerts more likely means fashionable, rock related attire rather than a jacket and tie. They are not comfortable with ballet and opera audiences.

Ticket price and visual arts and crafts product price do not appear to be a barrier to them, but interest clearly is. When they attend performances they like to see "stars" and shows that have been hits. They are not attracted to the unique and unusual. There is some tendency for them to find stage plays boring, although the tendency is not altogether strong. Similarly, there is a tendency to say that performances like theatre take too much concentration.

Carefree Pop/Rockers are not especially attracted to the arts in terms of the values the arts represent. For example, many reject the idea that museums and art galleries make a community a better place in which to live.

They do, though, believe Canadian artists are among the best in the world, and there is some tendency to prefer Canadian artists in live performance.

In terms of demographic characteristics, Carefree Pop/Rockers are invariably under age 35. Fully 70% are under this age level, while 37% are singles without children, and a quarter live at home. Their home is more likely to be outside a major urban centre. In fact, 39% live in communities of fewer than 100,000 people, compared with 28% for the population overall.

As noted, Carefree Pop/Rockers' taste in performances is focused on rock and pop music, although this does not preclude their attending other types of performances. Some appear to attend comedy in theatres, and they display a healthy interest in stand-up comedy. They also display some interest in attending more Traditional performing arts performances.

Although they are the most focused segment on pop/rock, Carefree Pop/Rockers are quite similar to some other segments in terms of their recall of childhood exposure to the arts. Half (51%) report attending theatrical performances as a child, while a third (35%) and a fifth (18%) respectively report attendance at dance and classical music performances.

6.2.8 TUNED OUT

This small segment (6%) is the most negative toward the arts, but they also are the least likely to attend any type of performance or to express interest in attending more performances. The Tuned Out indicate that they do not like to make an evening of attending a concert or theatre and that, in fact, they would far sooner have friends to the house than go out. They express limited interest in purchasing art work or tickets, and do not indicate that time is a particularly important barrier for them although interest clearly is.

They appear to place little value on museums or art galleries in the community and find little to value in the arts. Needless to say, they express little interest in being an artist, nor are they especially nationalistic regarding the arts.

Demographically, their income is a little above average and their education a little below. They are predominantly male (71%) and predominantly Anglophone (91%). In all other respects their demographics are similar to the sample overall. Their attendance patterns indicate sparse attendance at all types of Traditional performing arts and Popular performing arts. They are the least likely of all the segments to express interest in attending performances more frequently.

Childhood experiences seems in line with actual interest, as Tuned Out show the lowest proportions of recollection from attending theatre (48% versus 59%) and dance (24%, 39%) during childhood; classical music, while not the lowest (21%, 28%), is significantly under the average. Artistic activities regularly practiced when a child are also low and among the lowest, while sports receive results in or slightly above average.

PSYCHOGRAPHIC TABLES

MEAN SCORES FOR PSYCHOGRAPHIC SEGMENTS FOLLOWED BY DEMOGRAPHIC, BEHAVIOUR AND OTHER VARIABLES

Segments

1	Devoted
2	Believers
3	Practitioners
4	Conditionals
5	Uncommitted
6	Uninvolved
7	Carefree Pop/Rockers
8	Tuned Out

NOTE: The mean scores in the following 7 tables describing responses to the agree/disagree statements, by segment, are based on each segments' responses to each statement. The mean scores are derived from the scale of +3, indicating agree strongly, to -3, indicating disagree strongly, and are used in the Attitudes toward the Arts section of this chapter.

Table 2.29

Segments: CONTEXT FOR AN OUTING

STATEMENT	SEGMENT (Mean Score) 1	2	3	4	5	6	7	8
I like to make an evening of going to a concert or theatre	2.46	2.33	2.10	1.95	1.27	1.16	1.73	0.00
I usually only go to a concert or performance when I or my family have something to celebrate	-2.22	-1.90	-1.40	-1.01	-0.99	-0.86	-1.86	-1.32
When I go out for an evening, I basically want to relax and be entertained	2.28	2.59	2.66	2.66	2.46	2.70	2.44	2.37
I usually like to plan well ahead of time,where I am going, when going out for the evening	1.36	0.70	1.40	1.66	0.29	1.67	0.80	0.53
I usually prefer to see shows/ performances on TV or listen to one on radio than attend a live one	-2.16	-1.89	-1.30	-0.29	-1.02	0.35	-1.41	0.42
I would sooner spend an evening at home with friends than go to a show/ performance	-1.73	-1.07	-1.39	0.09	0.20	0.92	-0.97	1.05

NOTE: The mean scores in the tables following, describing responses to the agree/disagree statements, by segment are based on each segments responses to each statement. The mean scores are derived from the +3, indicating agree strongly, to -3, indicating disagree strongly, scale, used in the attitudes toward the Arts section of this chapter.

Table 2.30

Segments: THE SETTING

STATEMENT	SEGMENT (Mean Score) 1	2	3	4	5	6	7	8
I like to attend a performance in a place where I can feel at home and relax	1.75	1.83	1.69	2.34	1.58	2.32	1.95	1.65
I prefer to go to shows where I don't have to dress up	0.18	-0.80	-0.69	0.95	1.02	1.34	0.08	0.93
The people who go to shows, like ballets or operas, are not really my type	-2.11	-2.03	-1.36	-0.10	0.39	1.07	0.64	0.20

Table 2.31

Segments: CONSTRAINTS OF MONEY, TIME AND AVAILABILITY

STATEMENT	SEGMENT (Mean Score) 1	2	3	4	5	6	7	8
I would probably buy more works of art if they weren't so expensive	2.15	1.98	1.06	2.28	1.64	1.55	0.05	-0.19
I would like to attend more shows/performances, but they are too expensive	2.04	1.37	1.30	2.10	1.77	2.04	0.67	0.27
I don't have enough time to attend more shows/performances, but I would like to	0.07	1.25	0.04	1.21	0.79	0.90	0.94	-0.41
I would probably go to more shows or performances if they put on the kinds of things I like	-1.23	-0.37	-0.61	1.13	0.71	1.40	0.54	0.15
I would attend more performances if there were more performances in my community	-1.44	0.07	-0.10	1.20	-0.10	1.00	0.97	-0.82

Table 2.32

Segments: LIKES AND DISLIKES

STATEMENT	SEGMENT (Mean Score) 1	2	3	4	5	6	7	8
I really like to see star performers in person	1.57	1.91	1.20	2.08	1.33	1.79	2.06	0.07
I like to go to shows/performances that are unique and out of the ordinary	0.72	1.07	0.23	1.19	0.76	0.09	0.32	-0.68
I like to attend shows/ performances that have been big hits	0.51	1.16	1.34	1.70	0.80	1.64	1.72	0.09
I think most stage plays are pretty boring	-1.95	-2.13	-1.93	-0.64	-1.16	-0.04	-0.35	-0.18
Attending live performances such as plays and ballets requires too much concentration	-2.51	-2.18	-1.99	-1.15	-0.63	-0.38	-0.19	-1.16
I don't like pictures or sculptures that are too abstract and don't portray real objects	-0.65	-0.54	1.01	1.59	-0.09	1.53	0.68	1.52
Recordings of classical music are of such high quality today that the sound you can hear in your home is as good as going to a concert	-0.58	0.82	0.07	0.84	0.19	0.59	-0.07	0.89
I sometimes think I could do better than what passes for art today	-1.41	-0.53	-1.11	0.22	-0.01	-0.52	-0.96	0.15
I really enjoy going to museums and art galleries and looking at the art work	1.85	1.78	0.99	1.68	-0.17	0.22	-1.12	-0.61

Table 2.33

Segments: USES AND VALUES ATTRIBUTED TO THE ARTS

STATEMENT	SEGMENT (Mean Score) 1	2	3	4	5	6	7	8
Being able to appreciate things like classical music is a sign of being cultured and sophisticated	-0.52	-0.65	-0.81	0.47	-0.19	-0.45	-0.36	-2.02
Museums and art galleries make a community a better place to live	2.42	2.21	1.56	2.25	1.40	1.09	0.36	0.29
It is important to expose children to the arts	2.70	2.62	2.18	2.40	1.81	1.62	0.98	0.79
The arts in Canada are important because they are one of the things that helps make us unique and different from other countries	2.11	1.58	0.64	2.01	1.20	1.11	0.92	-0.95
Artists reflect what life is really like in a given time, so what artists do is an important part of the history of our country	1.91	1.49	0.71	1.71	0.98	0.92	0.35	-1.42
Arts teaches us to be better people	0.71	1.42	0.55	0.90	0.62	-0.27	-0.07	-1.51
The arts give me a lift from everyday experience	2.12	2.10	1.66	1.77	0.81	0.27	0.19	-1.10
The most important kind of performing or visual art is the kind that makes a comment about the society we live in	-0.60	0.50	-0.55	0.69	0.09	0.33	0.39	-0.91

Table 2.34

Segments: VIEWS ON ARTISTS

STATEMENT	SEGMENTS (Mean Score) 1	2	3	4	5	6	7	8
I think most people in the arts don't really care about the audience they are performing for	-2.32	-2.18	-1.96	-1.23	-1.65	-0.78	-1.80	-1.25
I usually don't know what to say when I meet people who are artists	-0.73	-1.11	-0.02	0.39	0.64	1.23	-0.35	0
I would love to be an artist of some kind	1.03	2.02	0.56	1.02	0.93	-0.35	0.68	-1.37
Artists make a major contribution to our society	2.57	2.30	2.06	2.15	1.72	1.72	1.18	0.15

Table 2.35

Segments: THE NATIONAL FACTOR

STATEMENT	SEGMENT (Mean Score) 1	2	3	4	5	6	7	8
If asked I could name between five and ten Canadians who are professionally involvedin the arts	2.03	1.73	0.34	1.34	-0.81	0.38	0.24	-1.26
I prefer to attend shows/ performances featuring artists from this country	-0.05	0.40	-0.36	0.96	-0.36	1.12	0.43	-0.91
Canadian performers are as good as performers anywhere else in the world	2.06	2.30	1.84	2.04	1.82	2.15	1.77	1.19

Table 2.36

MAJOR DEMOGRAPHIC VARIATIONS BY PSYCHOGRAPHIC SEGMENTS

	1	2	3	4	5	6	7	8	TOTAL
GENDER									
Male	39	46	43	51	55	54	57	71	51
Female	61	54	57	49	45	46	43	29	49
AGE									
16-24 years	11	20	14	13	24	15	32	14	17
25-34 years	22	27	26	25	33	29	37	30	28
35-44 years	29	26	24	26	23	23	17	26	24
45-54 years	16	13	15	16	12	15	8	12	14
55-64 years	12	8	11	12	6	10	4	8	9
65 years or older	8	6	10	8	4	8	2	10	7
HOUSEHOLD INCOME									
Less than $10,000	4	5	6	7	7	6	5	5	6
$10,000-$19,999	10	11	9	16	11	15	11	13	12
$20,000-$29,999	16	14	14	20	20	23	20	17	18
$30,000-$39,999	18	18	17	14	17	18	20	14	17
$40,000-$49,999	18	19	19	17	20	16	20	17	18
$50,000-$59,999	14	10	15	13	10	11	12	15	12
$60,000-$74,999	10	10	10	6	8	7	5	9	8
$75,000 and over	12	15	11	8	7	3	7	12	9
EDUCATION (highest level)									
Less than high school	15	5	7	9	19	13	30	13	17
High school graduation	19	21	27	28	27	31	35	33	27
College	20	16	17	19	18	17	20	14	18
Some university	9	10	10	8	7	5	6	9	8
Bachelor's degree	21	19	17	12	14	6	7	10	14
Grad./Prof. degree	15	9	8	4	4	2	3	5	6
Student	10	17	12	10	16	9	15	11	13
LIFE CYCLE STAGE									
Single, no children at home, under 45 year	20	30	22	22	35	18	37	25	26
Married, no children at home, under 45 years	11	12	10	9	12	11	16	12	11
Married, children at home, under 45 years	28	27	30	30	29	35	33	32	30
Single parent	6	5	4	5	4	4	2	3	4
Married, children at: home over 45 years	10	7	10	9	8	11	5	8	9
Married, no children at home, over 45 years	15	12	15	16	8	14	6	16	13
Single, no children at home, over 45 years	10	6	10	9	4	6	2	5	7

Table 2.37

ATTENDANCE PATTERNS BY PSYCHOGRAPHIC SEGMENT

	1	2	3	4	5	6	7	8	Total
ATTENDANCE AT SELECTED EVENTS									
Concerts/performances at least five times a year (%)	36	32	21	18	14	10	19	6	20
Watch performance at club/bar at least five times a year (%)	29	26	16	18	24	17	28	15	21
Go to a movie at least five times a year (%)	44	47	35	32	43	25	42	27	37
Mean number of evenings out a week	2.64	2.86	2.55	2.71	2.80	2.74	3.18	2.57	2.74
ATTENDANCE AND INTEREST IN POPULAR PERFORMING ARTS									
Attended in last six months, would like to attend more frequently	59	63	51	50	49	41	59	32	47
Attended in last six months, content with attendance	8	9	10	9	7	8	8	10	8
Attended in last five years, would like to attend more frequently	18	17	20	19	18	22	18	18	19
Attended in last five years, content with attendance	4	3	5	3	4	5	3	8	5
Never attended, would like to	6	5	8	10	12	13	8	14	10
Never attended, no interest in attending	4	3	7	9	10	11	4	19	11

Table 2.37 (continued)

ATTENDANCE PATTERNS BY PSYCHOGRAPHIC SEGMENT

	1	2	3	4	5	6	7	8	Total
Attendance and interest in Traditional Performing Arts									
Attended in last six months, would like to attend more frequently	67	58	45	39	30	24	30	15	37
Attended in last six months, content with attendance	6	8	10	8	10	8	10	10	9
Attended in last five years, would like to attend more frequently	16	16	18	17	16	15	14	13	16
Attended in last five years, content with attendance	2	3	6	5	7	7	6	7	6
Never attended, would like to	7	9	13	14	14	16	12	13	11
Never attended, no interest in attending	3	7	8	17	24	31	29	41	21

Table 2.38

PURCHASE PATTERNS BY PSYCHOGRAPHIC SEGMENTS

	1	2	3	4	5	6	7	8	Total
ART: PURCHASE BEHAVIOUR AND INTENT									
Purchased last year:									
Very likely to purchase in next 2 years	22	19	9	10	2	7	5	4	10
Unlikely to purchase in next 2 years	19	17	20	15	12	14	11	11	15
Purchased in last 5 years:									
Very likely to purchase in next 2 years	7	10	4	5	4	2	3	2	5
Unlikely to purchase in next 2 years	17	16	19	23	17	15	12	20	17
Never purchased	34	38	47	46	58	63	66	59	51
CRAFT: PURCHASE BEHAVIOUR AND INTENT									
Purchased last year:									
Very likely to purchase in next 2 years	21	16	7	8	6	2	6	3	9
Unlikely to purchase in next 2 years	19	14	17	10	9	11	7	8	12
Purchased in last 5 years:									
Very likely to purchase in next 2 years	4	8	4	4	3	1	3	1	4
Unlikely to purchase in next 2 years	14	9	12	11	7	11	8	9	11
Never purchased	42	52	57	66	73	72	77	77	64

Table 2.39

CHILDHOOD EXPERIENCES BY PSYCHOGRAPHIC SEGMENTS

	1	2	3	4	5	6	7	8	Total
% RECALL ATTENDING AS A CHILD									
Theatre	69	69	61	60	57	49	51	48	59
Dance	43	51	39	39	35	32	35	24	39
Classical music	46	41	30	27	24	16	18	21	28
Children's performance	64	66	55	54	53	49	52	41	55
REGULAR ACTIVITIES AS A CHILD									
Visiting art galleries	15	24	21	13	17	14	8	7	9
Visiting museums	47	43	36	40	35	26	29	31	36
Playing team sports	65	69	71	71	72	75	79	72	71
Playing individual sports	51	57	48	57	53	55	56	57	54
Taking dance/ ballet classes	24	19	19	14	13	11	10	11	16
Taking drama/ acting classes	14	16	11	10	10	7	13	8	11
Learning a musical instrument	53	54	48	45	48	37	42	37	47
Taking art classes	20	31	19	23	24	13	20	12	22
Singing in a choir	52	50	45	47	40	35	38	33	43
No opinion	4	3	5	6	5	8	4	10	6

Table 2.40

INTEREST IN TYPES OF PERFORMANCE AND AMOUNT PREPARED TO PAY FOR A TICKET BY PSYCHOGRAPHIC SEGMENT

	1	2	3	4	5	6	7	8	Total
Dance:									
Dollar value	$14	$15	$12	$10	$9	$6	$8	$6	$11
% nothing/not interested*	20	14	26	26	33	41	37	54	28
Theatre:									
Dollar value	$21	$22	$21	$16	$15	$12	$15	$12	$17
% nothing/not interested*	2	2	3	6	12	20	17	32	9
Classical Music:									
Dollar value	$17	$17	$14	12	$10	$6	$8	$6	$12
% nothing/not interested*	13	17	28	26	39	53	50	61	32
Pop/rock:									
Dollar value	$15	$18	$16	$15	$17	$15	$21	$15	$17
% nothing/not interested*	27	18	25	18	17	26	9	28	21

* Responses for % nothing/not interested indicate that respondents were either not interested in this performance type or would not be prepared to pay to attend this type of performance. In either case the percentages provide a measure of the level of relative interest in each performance type. The smaller the percentage saying nothing/not interested, the higher the level of interest in attending.

Chapter 3

Performing Arts in Canada

As well as a stage, the world is a market in which artists and other colleagues working in the cultural sector wonder what leads people to see or not to see a play. This chapter explores three aspects of that market:

- who lives in each of the 11 zones surveyed by the Canadian Arts Consumer Profile;
- what has been inventoried as available and what is perceived to be available in each zone;
- what are the more common barriers and motivations to attendance.

These three areas are explored first in an overview of all zone and followed by a summary of major findings for each individual zone. The two data sets, general public and performing arts audience, are used as appropriate, as are the inventories of performing arts facilities and performances.

1 OVERVIEW

1.1 The Population

1.1.1 POPULATION, PSYCHOGRAPHICS, BEHAVIOUR AND INTENTION

Table 3.1
General Public: PSYCHOGRAPHIC SEGMENTS, BY ZONE

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
Devoted	5	10	4	9	5	8	3	4	10	9	15	8
Believers	23	18	16	14	18	10	12	17	19	22	16	17
Practitioners	18	18	11	15	14	12	10	11	16	17	11	14
Conditionals	15	14	21	15	18	23	19	19	12	14	20	18
Uncommitted	16	14	16	19	14	9	14	15	21	17	11	14
Uninvolved	14	15	18	14	16	28	30	20	10	12	17	17
Carefree Pop/Rockers	4	6	5	6	8	7	8	7	3	5	6	6
Tuned out	5	6	9	9	7	4	4	7	8	6	3	6

Higher than average representation of the three clusters of more frequent performance attenders, namely the Devoted, Believers and Practitioners, are found in British Columbia, Alberta, and Toronto. With respect to Believers in particular, British Columbians, outside of Vancouver, have a higher representation, compared with the other zones. Residents of Québec outside of Montréal, and New Brunswick are least likely to fall into any of these three groups of performance attenders. More specifically, very few residents of New Brunswick qualify as Devoted. Further, Québec outside of Montréal, has a lower than average representation of Believers.

Among those clusters with less frequent attendance at performances, variations across the eleven zones do emerge. Most notably, residents of Vancouver are less likely to be Conditionals or Uninvolved, and more likely to be Uncommitted. Québecers, outside of Montréal, are slightly less likely to be Uncommitted, and more likely to be Conditionals or Uninvolved. As indicated in Table 3.1, New Brunswick has a noticeably higher proportion of Uninvolved, compared with other zones across the country.

1.1.2 ATTENDANCE PATTERNS FOR TRADITIONAL AND POPULAR PERFORMING ARTS

As noted in Chapter 2, although more Canadians report having attended a popular type of performance in the last six months, the difference in attendance patterns between traditional and Popular types of performing arts is not great. As shown in Table 3.2, in all, close to half the population (46%) report attending some type of traditional professional performance in the last six months or so, compared with just over half (55%) who have attended the Popular performing arts (Table 3.3).

Also of note from Chapter 2 is the fact that the largest proportion of the population expressing an interest in attending more performances, of both traditional and Popular types, are those who already constitute the current audience. At this stage, without taking into account specific motivations and constraints, market penetration potential would seem greater than market development potential. There are, though, considerable variations to this national overview when zones are considered.

Table 3.2
General Public: ATTENDANCE PATTERNS AND INTEREST IN ATTENDING MORE TRADITIONAL PERFORMING ARTS, BY ZONE

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
ATTENDANCE/ TRADITIONAL PERFORMING ARTS												
Attended last 6 months	46	47	34	41	41	51	35	31	50	54	57	**46**
Attended last 5 years	21	24	18	19	22	22	19	17	21	24	20	**21**
Never attended	33	28	48	40	37	26	46	52	28	22	23	**32**
INTEREST IN ATTENDING MORE TRADITIONAL PERFORMING ARTS												
Attended last 6 months:												
Interested	36	39	27	32	31	41	27	25	47	44	41	**37**
Content	9	8	7	9	9	10	8	7	9	10	9	**9**
Attended last 5 years:												
Interested	16	18	10	13	17	15	12	12	14	17	16	**16**
Content	6	6	9	6	5	7	7	4	6	7	6	**6**
Never attended:												
Interested	13	10	12	14	12	9	15	17	11	8	13	**11**
Content	19	19	36	26	25	17	30	35	12	14	15	**21**
TOTAL INTERESTED	**65**	**67**	**49**	**59**	**60**	**65**	**54**	**54**	**72**	**69**	**70**	**64**

Perhaps not surprisingly, given the availability of product, Table 3.2 indicates that the residents of the three main urban centres tend to be the most likely to report recent attendance at a Traditional performing arts event (classical music, theatre, dance and opera). Major regional markets are Québec outside of Montréal, Alberta and British Columbia outside of Vancouver, where 51%, 47% and 46%, respectively, report recent attendance.

At the other end of the attendance spectrum, Atlantic Canada (excluding New Brunswick), New Brunswick and Saskatchewan all have populations where half or close to half report lifetime non-attendance.

Table 3.3
General Public: ATTENDANCE PATTERNS AND INTEREST IN ATTENDING MORE POPULAR PERFORMING ARTS, BY ZONE

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
ATTENDANCE/POPULAR PERFORMING A.RTS												
Attended last 6 months	52	57	57	53	52	55	49	47	62	64	56	55
Attended last 5 years	22	25	23	24	28	22	25	22	23	21	25	24
Never attended	25	18	19	23	19	23	26	31	15	16	19	20
INTEREST IN ATTENDING MORE POPULAR PERFORMING ARTS												
Attended last 6 months:												
Interested	45	50	49	47	46	47	41	42	46	51	52	47
Content	8	6	9	7	6	8	8	5	11	13	10	8
Attended last 5 years:												
Interested	17	21	15	16	22	18	19	18	20	16	19	19
Content	6	5	8	7	6	3	6	4	5	5	4	5
Never attended:												
Interested	12	9	9	10	10	10	13	14	9	6	7	10
Content	13	10	10	13	10	13	13	16	9	9	9	11
TOTAL INTERESTED	74	80	73	73	78	78	73	74	75	73	78	75

As seen in Table 3.3, no great variation emerges in zonal attendance patterns for the Popular performing arts (pop/rock, jazz, folk, musicals). In all zones, recent attendance is close to or above the 50% range. Percent attendance is especially high in Toronto and Vancouver. It is also quite high in Saskatchewan and Alberta, but below average in the Atlantic zone and New Brunswick.

The relatively high level of attendance in Saskatchewan for the Popular performing arts, compared with the low attendance for the Traditional performing arts, may suggest that there are considerable variations in the availability of these two main types of performances.

1.1.3 INTEREST IN ATTENDING MORE PERFORMANCES

For both the traditional and Popular performing arts, as noted in Chapter 2, interest in attending at least one type of performance more frequently is very high: in excess of six-in-ten for Traditional performing arts, and seven-in-ten for Popular performing arts.

By zone, as Table 3.2 makes clear, interest in the Traditional performing arts is above average in the three major urban centres, and in Alberta. Interest is below average in the Atlantic zone, New Brunswick and Saskatchewan. For the Popular performing arts (Table 3.3), once again zonal variations are minimal and all zones express high levels of interest.

Similar to the national findings, those expressing the highest interest in attending performances more frequently are those who have already attended a performance of some

type in the last six months or so. What remains to be explored, and this is undertaken in Chapter 4, is the extent to which those who have attended a performance recently want to see more of the type of performances they currently attend or more of other performance types.

1.2 Performing Arts in Canada

1.2.1 Performing Arts Product Availability

Performing arts product availability greatly relies upon the existence of facilities and the presentation of performances: no facilities, no performances; no performances, no availability.

Findings from the inventory of the distribution of both facilities and performances, surveyed between September 1990 and August 1991, are discussed in the following section.

1.2.2 Distribution of facilities

In the jargon of performing arts professionals, a facility is a place where performances are presented or a venue where artists can present their works to an audience. Performing arts facilities come in different shapes, serve a variety of functions and bear numerous names. They include specialized concert halls and theatres, that are located mainly in large urban centres. Most cities, small or large, have various-sized multipurpose facilities. Churches, sports arenas, gymnasiums and community halls also serve as venues for the performing arts, although they were mostly excluded from this research project.

Indeed, the initial intention of this study was to inventory only those facilities classified as professional. For a better perspective of product availability in some rural areas and less populated centres, as well for a representation of several types of products, a selection of nonprofessional and nontraditional facilities were included. A facility has been recognized in this national survey as being active not by the traditional standards of quality, singularly applied cultural functions, technical staff or specialized equipment, but by its presentation of professional performing artists for the performance types being surveyed.

The following table compares the distribution of the population and the number of active surveyed facilities, that is, facilities which presented professional works during our research period, excluding festival locations. This table is not an exhaustive inventory of nonprofessional facilities, nor of alternate venues.

To reiterate, these tables include full-time and part-time presentational facilities as well as presenter-managed facilities and self-producing theatres, and should be viewed in the context of available product. Nevertheless, it is interesting to note that the number of inventoried active facilities is relatively proportionate to the population, with the exception of Ontario, which shows fewer inventoried active facilities for the population (16%, 26%), and Montréal, which shows the opposite (17%, 7%).

Table 3.4
INVENTORIED ACTIVE PROFESSIONAL PERFORMING ARTS FACILITIES IN CANADA (1990-1991)

	BC	Alta	Sask	Man	Ont	Qué	NB	Atl	Vanc	Tor	Mtl	Total
Facilities	13	25	19	16	54	62	17	20	20	43	59	**348**
% total	4	7	5	5	16	18	5	6	6	12	17	**100%**
Pop.(000) > 16 years	1,300,1	1,890	741,1	874,1	5,461,5	3,840,3	562,8	1,233,4	1,240	2,289,4	1,537,6	**20,970,5**
% total	6	9	4	4	26	18	3	6	6	11	7	**100%**

The types of facilities also vary greatly. Rural Saskatchewan and New Brunswick rely on community centres and high schools as their principal presentation facilities. Many choral groups, chamber orchestras and symphonies prefer accoustics or ambiance that are unavailable in most traditional facilities. For example, the Winnipeg Singers perform in Westminster Church, Tafelmusik performs in both Trinity St. Paul's United Church and St. Thomas' Church in Toronto, and the Montréal Symphony Orchestra performs in the Notre Dame Basilica during the summer.

This inclusion of nonprofessional and nontraditional facilities improved the inventory representation but also reveals that the number of performances inventoried varies dramatically depending on the status and location of the facility. Theatre New Brunswick regularly tours its productions to six high schools in different localities in the province. For the period of our research, these tours were the only professional performances available in those facilities. At the other end of the spectrum are the traditional professional performing arts facilities such as Place des Arts in Montréal, Roy Thomson Hall in Toronto, The Orpheum in Vancouver, The Citadel in Edmonton and The Centre For the Performing Arts in Calgary, which offer performances almost any night of the season.

As classifying full-time presentational facilities alongside part-time facilities can result in discrepancies, the interesting point regarding the tables in this section lies not in the number of facilities, but in the number and diversity of available performing arts products, mitigated by zonal factors such as population and interest in a specific product type.

1.2.3 Facility Seating Capacity

A performing arts facility consists of certain basic physical characteristics, each corresponding to the needs and activities of the different users of the facility – artists, technicians, managers and, of course, the audience. These characteristics also vary greatly from one type of performing art to the next. The more a professional performing arts facility corresponds to the layout of basic physical characteristics for the type of performance it programs, the higher the facility quality and the quality of presentation of performances. Understandably, every facility accounted for in Canada, like elsewhere, cannot present the full range of performing arts in appropriate quality conditions, which not only affects the quality of the audiences' experience, but also product availability.

The number of seats in a facility is one of several important physical characteristics of a facility. Capacity affects the degree of product availability in two ways:

- quantitatively, a performance presented in a 280 seat facility is available to 280 people a night, not one person more;
- qualitatively, the number of seats directly influences the way in which the spectator experiences a performance. For example, children's attention would tend to wander in a large hall, so children's theatre companies tend to limit the number of 6 to 12 year olds to 400, and to even smaller groups for younger children. Further, the spoken voice of theatre becomes more difficult to project in most halls of more than 800 seats and a full symphony orchestra could not perform effectively in the small volume of a 500 seat hall.

Specialized facilities, such as theatres, opera or concert halls, are specifically designed for one type of performing arts product. These facilities are rare and are generally located in the downtown areas of large cities. The Festival Theatre in Stratford, Ontario, and the Amphithéâtre de Lanaudière, an outside concert hall in Joliette, Québec, are two notable exceptions. The design of specialized facilities usually allows for the best possible presentation conditions in the largest possible capacity. For a given type of product, most renowned and appreciated specialized facilities correspond to a particular capacity bracket. These observations are confirmed by the capacity of the European halls in which traditional art forms – theatre, ballet, opera, chamber and classical music – were developed in the last few centuries. The optimal capacity for distinct types of products is shown in the following table[1].

The figures are not presented as an absolute norm for all productions but as a reference appropriate for most productions of a given type.

Most performances in Canada are presented in multidisciplinary facilities. The quality varies from one to another and is also a function of the type of performing arts that are presented. A well conceived and designed multidisciplinary facility can adequately present several types of performing arts, though the quality of presentation of a given type of product will not equal that of a specialized facility. Opera, for example, needs special accoustics and specific staging requirements which correspond to the requirements of ballet, but differ greatly from those of theatre or symphonic music whose ideal capacities vary as well.

Seating capacity can be a reliable indicator of the possibility of presenting types of products in a given facility. The Canadian Arts Consumer Profile recorded the capacity of all inventoried and surveyed performing arts facilities in order to analyze how product availability is affected by the capacity of facilities. For each zone the distribution of facilities, according to their capacity, can be related to the ideal capacity for small, mid and

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1 This typology is derived from a June 1991 study of the performing arts facilities market in the Montréal area which integrated market penetration assessments, and facilities' physical and technical requirements, for different types of performing arts products. Cultur'inc inc. prepared *L'Étude sur le marché des lieux de diffusion en arts d'interprétation dans la région de Montréal* for the Department of Communications, the Ministère des Affaires culturelles du Québec and the City of Montréal.

large scale productions. The fact that most multidisciplinary facilities have a lower potential for quality presentation is not taken into account. Analysis is performed as if every facility is a facility specializing in the type of professional performing arts product requiring its capacity.

Table 3.5
IDEAL SEATING CAPACITY BY TYPE

Specialized Facilities	Optimum no. of seats
Opera/ballet	less than 2,200
Symphonic music	less than 2,000
Chamber music	600 to 1,000
Theatre	400 to 900
Experimental theatre and dance	
Small and mid-sized productions	150 to 250
Large productions	400 to 850
Popular performing arts	
Small productions (upcoming artists, jazz, blues, etc.)	less than 600
Mid-sized productions	600 to 1,200
Large productions	1,200 to 3,500
Mega-productions (rock, events, etc.)	arenas, stadium 3,500 and more
Young audience productions	
Children	100 to 400
Adolescents	500

Table 3.6, which follows, indicates the number of facilities surveyed in each zone, and categorizes them according to seating capacity.

Table 3.6
SEATING CAPACITY OF FACILITIES INVENTORIED BY ZONE

Capacity	BC	Alta	Sask	Man	Ont	Qué	NB	Atl	Vanc	Tor	Mtl	Total	%
< 400	4	9	9	11	18	20	2	10	15	25	29	152	44
400-800	7	12	7	1	19	28	11	5	3	9	13	115	33
800-1200	1	1	1	2	8	9	2	4	0	3	9	40	11
> 1200	1	3	2	2	9	5	2	1	2	6	8	41	12
Total	**13**	**25**	**19**	**16**	**54**	**62**	**17**	**20**	**20**	**43**	**59**	**348**	**100**
%	3.7	7.2	5.5	4.6	15.5	17.8	4.9	5.7	5.7	12.4	17	100	

A quick look at this table reveals that large active professional performing arts halls are rare; three out of four facilities have smaller capacities. Larger facilities seem to correspond in quantity to the number of main markets in each zone to host resident operas and ballet companies, orchestras and larger Popular performing arts productions.

Facilities between 800 and 1,200 seats are often viewed as a good compromise for the artistic needs of most touring productions (theatre, dance, symphonic music, some variety, etc.) which may be ideally suited to either a smaller or larger capacity. These productions often, however, require a minimum number of seats to satisfy both touring costs and those of the presenters, and in communities where specialized halls cannot be supported by the marketplace, this capacity is a viable option for larger scale productions as well. It is therefore surprising to find that this versatile capacity accounts for only 11% of the inventoried facilities.

A geographical breakdown indicates important discrepancies between each zone that cannot be solely explained by population distribution. A horizontal overview of the numbers illustrates the difficulty of touring in certain zones as well as the very limited opportunities to present certain types of products in facilities of optimal capacity.

It is also important to note that the distribution system for the professional performing arts includes about 1,000 community, library and educational presenters whose participation in this research is minimal. However, while the inventory is not present, certainly the attitudes of the general public living in communities of less than 10,000 have been gathered, and perceived frequency is well analyzed, with specific zonal reference to interest and price elasticity.

1.2.4 PERFORMANCES

1.2.4.1 Fall-Winter-Spring

An assessment of professional product availability is completely dependent on the programming collected from a variety of sources such as the facilities themselves, professional organizations, industry contacts, cultural periodicals, etc. (method of collection detailed in the Methodological Appendix).

While it cannot be said that the inventory represents all the available product, it is certainly demonstrative.

The Canadian Arts Consumer Profile inventory of 1990-91 programming (see Methodological Appendix) can be taken as a useful indicator of the availability of publicly-funded professional Traditional performing arts (i.e. dance, theatre, opera and classical music) in professional facilities. The Traditional types of performing arts usually follow a seasonal – September through June – pattern of performances and tours, and generally present their productions in traditional facilities. Exceptions to this seasonal presentation pattern can be found in major urban centres, as well as at the Stratford and Shaw Festivals in Ontario, and on the festival circuit, which were also surveyed.

This is not the case for most of the Popular or variety performing arts, which are often presented in the free-floating market of commercial clubs, arenas or stadiums. Variety performers (unless an artist or group has a substantial box-office draw or an elaborate stage set-up) appear to have minimal constraints regarding equipment, technical personnel, number of performances and facility seating capacity. The inventory does not account for many of these venues or circumstances. According to this survey's definition of Popular performing arts, musicals are the exception. While they can be either commercial ventures such as the current *Phantom of the Opera*, or part of the publicly-funded theatre season, they usually require a well-equipped facility with a reasonable seating capacity and, therefore, appear in the programming of traditional venues.

Table 3.7 illustrates the number of performances of each type of performing arts inventoried in the 11 zones. Figures differ from Statistics Canada's recently published performing arts survey for 1989-90, as methods and definitions vary (see Methodological Appendix).

During the regular season – September through June – the Traditional performing arts accounted for 63% of available product (12,216 performances). Theatregoers obviously had the most opportunity to satisfy their interest with 9,700 performances or nearly 80% of all the Traditional performing arts presentations. Dance lovers had the least with 712 or 6% of the Traditional performance types.

In the Popular performing arts, musicals represented 1,680 opportunities-to-view. This is not surprising given their previously mentioned use of traditional facilities and the current trend of long-running productions. The chances of catching a country and western artist perform in this distribution network, were slim, with only 66 presentations for all regions. The presentations of rock/pop and comedy in Québec, and comedy in Toronto indicate a higher usage of the traditional network in these zones for what are more often stadium/arena or club-oriented genres.

Geography, therefore, generally appears to favour an individual residing in Montréal, Toronto and Vancouver or the more populated provinces of Ontario, Québec and Alberta with more choice, more often in the inventoried network. The less mainstream categories of contemporary classical music or avant-garde theatre appear to have little exposure outside of those regions. Individuals residing in New Brunswick are more likely to state "no availability" as their reason for not attending more performances.

Table 3.7

DISTRIBUTION OF PERFORMANCES, SEPTEMBER 1990 – JUNE 1991, BY TYPE AND ZONE

	BC	Alb	Sask	Man	Ont	Que	NB	Atl	Vanc	Tor	Mtl	Total
Ballet	14	25	12	28	47	14	7	6	20	77	33	283
Contemporary dance	10	63	4	29	67	23	10	21	39	74	89	429
Theater: comedy	206	710	92	110	585	161	37	120	389	1323	344	4077
Theater: drama	132	497	177	339	518	269	83	261	385	670	1104	4435
Theater: avant garde	1	29	12		169	123		2	15	223	612	1186
Opera	10	18	6	10	30	35	1	3	31	69	62	275
Symphonic music	32	37	7	40	106	72	1	26	60	61	77	519
Symphonic Pops concerts	11	20	2	21	58	9	2	4	13	3	8	151
Chamber music/class. soloists	20	19	12	32	46	123	10	22	45	70	159	558
Contemporary classical music	4	1	5		4	8		6	9	45	50	132
Choral music	9	14	4	4	58	14	4	10	18	16	18	169
Pop/rock music	14	18	14	5	48	334	15	11	24	12	129	624
Comedy	8	22	4	4	30	226	5	6	16	197	96	614
Folk music	7	20	8	23	23	34	2	29	40	6	9	201
Musicals	41	147	27		251	9		39	277	702	187	1680
Jazz/blues	17	26	12	6	35	35	4	12	26	39	41	253
Country & western	2	11	7	2	15	4	1	17	5		2	66
Children's music, theatre, and dance	85	219	40	239	733	426	23	64	663	283	338	3113
Ethnic and heritage dance/music	16	18	6	7	17	1		13	40	28	44	190
Total	**639**	**1914**	**451**	**899**	**2840**	**1920**	**205**	**672**	**2115**	**3898**	**3402**	**18955**

1.2.4.2 Summer/Festival

The method of inventory developed for the Fall-Winter-Spring season was adjusted to accommodate an interest in examining the festival phenomena and also to accommodate the vagaries of summer programming, such as:

- only a few productions can be attributable to the main distribution network;
- summer theatres often present a single product, theatre comedy, in a network concentrated in a few areas (over 100 in the Montréal and Québec regions and none found in Saskatchewan);
- many summer programmers outside the main urban centres and major festivals have a light, temporary administrative structure;
- for many events, such as festivals, programming consists of a combination of paid, free and sometimes spontaneous performances simultaneously staged at nontraditional venues at a variety of sites.

The summer programming inventory is not, nor was it intended to be, a reliable indicator of product availability, but rather an information base for surveying performances, and included:

- individual festival performances as surveyed, not the number of performances in the festival (i.e., if one performance was surveyed, one was entered, if two performances were surveyed in the same festival, two were entered);
- limited programming received from traditional facilities, and the Stratford and Shaw festivals;
- some summer theatres.

The development of the festivals category offered the chance to survey an audience that would not have ordinarily been reached, such as those consumers who would not think of buying a subscription to a classical music series at Roy Thomson Hall or Place des Arts, but have not missed the Boris Brott Music Festival in Hamilton in three years. Because of their thematic variety, festivals also provided a more diverse product type than otherwise found during the summer months.

While presentations in summer theatres and traditional facilities were sent the regular performing arts questionnaire during this period, festivals were sent the redesigned festival questionnaire.

1.2.5 AUDIENCE: PERCEIVED FREQUENCY OF PERFORMANCES

As observed earlier, over one third of Canadians feel they do not have the opportunity to attend live performances. Thirty-seven percent (37%) of both the general public and audience members indicate that they "agree strongly" or "agree somewhat" that they would attend more performances if more were available. The following table clearly illustrates the zonal variance among audience members regarding perceived availability of different types of performing arts products in their communities.

Table 3.8
Audience:
PERCEIVED FREQUENCY OF SPECIFIC PERFORMANCE TYPES IN COMMUNITY, BY ZONES

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
PERFORMANCE TYPE	PERCENT INDICATING PERFORMANCE IS AVAILABLE "FREQUENTLY" OR "OCCASIONALLY"											
Ballet	46	79	63	76	52	42	37	34	75	74	67	**60**
Contemporary dance	53	72	52	70	51	43	48	38	73	71	63	**59**
Theatre - drama	86	90	82	86	84	77	73	83	90	90	84	**85**
Theatre - comedy	84	87	76	83	84	86	73	81	86	88	89	**84**
Theatre - avant-garde	43	59	36	52	38	50	29	27	64	65	65	**50**
Musicals	70	76	61	73	76	34	46	70	79	85	59	**68**
Comedy	66	78	60	76	70	83	62	64	84	82	83	**75**
Symphonic music	73	80	72	77	77	68	55	61	84	82	80	**75**
Contemporary/ classical music	63	70	56	66	61	56	45	50	73	73	69	**63**
Symphonic pop concerts	57	69	55	69	61	50	30	43	70	72	67	**60**
Chamber/classical soloists	64	71	63	69	67	53	56	51	78	75	65	**66**
Opera	38	69	33	56	33	28	18	17	70	71	59	**46**
Choral music	65	65	69	65	70	62	69	60	74	74	65	**68**
Pop/rock music	67	74	70	78	64	67	71	64	72	76	75	**71**
Jazz/blues	57	68	57	64	54	46	48	44	68	71	69	**60**
Folk music	58	71	63	71	56	35	53	63	67	65	47	**58**
Country/western	60	77	72	72	55	33	63	65	59	62	40	**59**
Ethnic/heritage dance	55	70	71	71	51	32	38	43	63	65	44	**55**
Children's dance/ music/theatre	66	73	67	71	67	58	57	64	68	76	65	**67**

As expected, there are some significant zonal variations. People in the major urban centres are typically the most likely to say that performances of all types are available. Frequency is perceived to be especially high regarding the Traditional performing arts, particularly theatre drama and theatre comedy. Alberta audiences also tend to believe they are well served. The proportion saying performance types are available at least occasionally is, in most instances, as high as in the major cities. Manitoba audiences also rate availability quite high. Atlantic audiences are generally the most likely to rate availability lowest.

Overall, theatre drama and theatre comedy are the performance types most often cited as being frequently available. In excess of eight-in-ten audience members state this (Table 3.8), which concurs with the inventoried availability of 8,512 performances. However, avant-garde theatre with 1,186 performances and the third most inventoried Traditional

performing art would appear to offer more opportunities than is generally perceived, particularly in Montréal.

A number of other performance types are believed to be at least occasionally available by at least two thirds of audiences including symphonic music, chamber music and classical soloists, choral music, musicals, stand-up comedy, pop/rock music and children's performances.

To the extent of this survey's inventory, symphonic music, with 519 performances, does not appear to meet the expectations of frequency perceived by most audiences (75%), while chamber music (66%) appeared to offer comparatively more opportunities (558). The frequency of musical performances (1,680) appears to substantiate most audience members' perceptions with a notable exception: while 73% of Manitoba audiences declare the frequent or occasional availability of musicals, this survey did not record any programming for this performance type from the inventoried facilities and presenting organizations in Manitoba during the Fall-Winter-Spring season. Musicals were, however, inventoried in Manitoba during the summer season. Children's performances (3,113) with the third highest number of presentations of all performing arts, would seem to occur with greater frequency than is perceived by most audiences.

Comedy and pop/rock music are believed by most people to be readily accessible. As these performance types often present in nightclubs and arenas, it can only be concluded that they are not greatly available in the inventoried distribution network.

Table 3.9
General Public:
COMPARED STATED ATTENDANCE AT TRADITIONAL PERFORMING ARTS AND PERFORMANCES INVENTORIED IN SEASON

		TOR.	MTL.	ONT.	ALTA.	VAN.	QUÉ.	MAN.	ATL.	B.C.	SASK.	N.B.
PERFORMANCES	Rank	1	2	3	4	5	6	7	8	9	10	11
INVENTORIED	Nº	2,631	2,556	1,688	1,433	1,024	851	613	481	449	333	155
FACILITIES INVENTORIED	Rank	4	2	3	5	6	1	10	6	11	8	9
ATTENDANCE IN	Rank	2	1	7	5	4	3	8	11	6	10	9
LAST 6 MONTHS	%	54%	57%	41%	47%	50%	51%	41%	31%	46%	34%	35 %

While a certain correspondance exists between the ranking of performances inventoried and the ranking of facilities inventoried by zone, the declared attendance at the Traditional performing arts by general public respondents shows important discrepancies in both inventory statistics. Québec and British Columbia show better declared behaviour than inventoried availability, which can be explained by performance attendance out of the inventoried network or free concerts. The zones of Ontario, the Atlantic and New Brunswick show the opposite disproportion, which may be due to other factors such as the large number of volunteer presenter markets without access to professional facilities in Ontario and the predominance of volunteer presenters and smaller halls in the Atlantic and New Brunswick zones.

Table 3.10
General Public:
COMPARED STATED ATTENDANCE AT POPULAR PERFORMING ARTS AND PERFORMANCES INVENTORIED IN SEASON

		TOR.	QUÉ.	MTL.	ONT.	VAN.	ALTA.	ATL.	B.C.	SASK.	MAN.	N.B.
PERFORMANCES	Rank	1	2	3	4	5	6	7	8	9	10	11
INVENTORIED	Nº	956	642	464	402	388	244	114	89	72	40	27
FACILITIES												
INVENTORIED	Rank	2	3	5	11	4	1	6	9	6	10	8
ATTENDANCE IN	%	64%	55%	56%	52%	62%	57%	47%	52%	57%	53%	49%
LAST 6 MONTHS	Rank	1	6	5	8	2	3	11	9	4	7	10

The ranking of facilities and performances for Popular performing arts are less in sync than the Traditional performing arts, reinforcing the concept that these performances are not proportionately distributed nor available in all the surveyed facilities.

Similarly, stated attendance at Popular performing arts compared with inventoried Popular performing arts performances shows greater differences than at Traditional performing arts. This again demonstrates that the declared behaviour is most likely occurring out of the surveyed network (bars, clubs, arenas, stadiums, etc.). It is also possible that the halo effect also affected the results.

1.2.6 Perception of Facilities

Just as the presence or absence of facilities in a given market can be a positive or negative factor for market development, the facility itself can be either a positive or a negative factor for attendance.

If the parking is easy and secure and if the actors' voices are perfectly heard, theatregoers may be encouraged to return. If damaged seating ruined an outfit, if it took all intermission to get the attention of a bartender who delivered a low quality rye at the cost of a single malt or if the sight lines were bad, one may decide never to return.

Technical equipment, design and physical volume certainly affect the experience of attenders, as well as management and the programming of performances that correspond to the physical limitations of the facility. These latter criteria were, however, difficult to assess either through the general public or the audience surveys. Three more perceptible areas were chosen: parameters affecting the quality of the attenders' experience (comfort, accoustics, sight lines); the facility location and accessibility; and customer services and other peripheral issues (cleanliness, beverage services, washrooms, appearance of the building).

1.2.7 GENERAL PUBLIC

Over half (56%) of the members of the general public have been influenced in an attendance decision by the particular facility being used for a performance. As Table 3.11 indicates, one-in-five say they have been "frequently" influenced by the facility used. Among those saying there has been some influence, two thirds (66%) say this influence has, over time, been both positive and negative. Where respondents make a specific choice, they are more likely to say this influence has been positive rather than negative.

Table 3.11
General Public: FACILITY INFLUENCED DECISION TO ATTEND, BY ZONE

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
HAS FACILITY EVER INFLUENCED DECISION TO ATTEND												
Frequently	19	16	17	13	20	25	24	20	15	17	22	19
Occasionally	34	36	32	40	37	33	34	36	41	41	36	37
INFLUENCE OF THE FACILITY												
Positive	22	22	24	14	24	18	20	24	19	20	18	21
Negative	13	8	6	8	8	12	10	8	7	6	13	9
Both	60	66	67	73	62	68	65	63	70	71	65	66

The fact, however, that ambivalence is high across the country (between 60% and 73%) indicates that this influence is not exclusive to large cities' specialized halls and that every zone has its favourite – and least favourite – facility.

A number of factors related to a facility appear to be "very" important for Canadians, and presumably play a role in the decision to attend a performance.

The factors directly responsible for the attender's quality experience (view, sound and seat comfort) are mentioned often. In fact, the view of the stage from one's seat (74%) and the quality of the sound (69%) are rated as being the most important attributes of a facility, well ahead of any other feature. Comfortable seating rates third, with 49% saying it is "very" important. Of somewhat lower importance, but still significant, are two access related issues; namely ease of parking and ease of getting to the facility (39% and 38% respectively, rate these as being "very" important).

Most factors related to customer service (available beverage services and lobby) appear to be less important, with the exceptions of cleanliness of the facility, which was considered of great importance by close to half of Canadians, and the washrooms in a facility (38%). Appearance of the building, often seen as very important by urban planners, seems to be a lower priority for general public respondents (12%).

Zone variations, although limited, reflect the differences between Québec and the rest of Canada. The quality of the sound, especially, and the comfort of seating are less important in the decision to attend for the general public in Québec, compared with elsewhere. The quality of the house program is rated as being more important in Québec and Montréal than elsewhere by a considerable margin. Also of significance is the greater importance of a facility's washrooms in the decision-making process to Atlantic and New Brunswick residents (see Table 3.12).

More than half the residents of Québec (53%) say that the quality of the house program has a "very" important influence on their decision to attend a performance; 47% of Montrealers agree, while the national average is only 27%. In both zones, house program is the third most important factor. The Québec and Montréal audiences also rate the house programs as more important than the other zones. This enthusiasm may be the result of a typically Canadian speciality: nuances in applied semantics. In French and English *program* stands for that piece of paper or booklet handed out to attenders before the performance. The same term can also be used to describe the works that are programmed, particularly in classical music. In English, the piece of paper is called *house program*, while in French *programme* stands alone. The researchers' empirical knowledge of the *house programs* from both French and English markets does not document sufficient distinctiveness that would explain such passion from the Québec and Montréal general public and, to a lesser degree, audiences, for house programs. Semantic confusion must be suspected as having some part in this particular result for these two zones.

Even so, the national average would suggest that the house program is a significant item for some people.

Table 3.12
General Public:
IMPORTANCE OF VARIOUS ASPECTS OF A FACILITY IN ANY ATTENDANCE DECISION BY ZONE

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
ASSESSMENT OF FACILITY	PERCENT SAYING "VERY IMPORTANT"											
Accessibility of the facility												
Ease of parking	34	35	43	44	42	39	42	44	41	39	35	**39**
Ease of getting to facility	33	32	40	36	42	39	39	41	34	38	36	**38**
Quality of the hall												
View of stage from seat	71	73	69	72	79	72	72	71	73	73	69	**74**
Quality of sound	76	70	70	69	72	63	72	71	72	70	63	**69**
Comfort of seating	50	53	46	50	54	43	52	56	46	55	35	**49**
Services to customers and other factors												
Cleanliness of hall	43	45	41	40	47	39	48	49	40	44	34	**43**
Washrooms	34	37	39	37	41	43	50	48	33	34	30	**38**
Quality of house program	16	22	24	19	20	53	32	22	21	19	47	**28**
Ease of access to seats	19	23	26	25	30	32	31	34	24	24	23	**27**
Appearance of building	10	12	16	13	18	7	18	19	12	11	6	**12**
Lobby	9	11	12	11	10	12	15	14	9	9	8	**10**
Beverage services available	3	8	6	7	7	6	10	11	9	6	4	**6**

1.2.8 AUDIENCE

Audiences are virtually identical to the general public in their assertion that a facility has "frequently" or "occasionally" (56%) influenced their decision to attend a performance.

Like the public, audiences also say a facility's impact on their attendance can be both positive and negative, and that it depends (63%). Compared with general public results by zone, again, little differences are found from the audiences point of view.

Table 3.13
Audience: FACILITY INFLUENCED DECISION TO ATTEND, BY ZONE

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
HAS FACILITY EVER INFLUENCED DECISION TO ATTEND												
Frequently	23	18	19	19	22	22	15	16	21	18	16	20
Occasionally	35	38	36	36	40	33	36	41	41	39	34	36
INFLUENCE OF THE FACILITY												
Positive	17	20	22	17	25	22	17	21	19	20	19	20
Negative	13	11	6	10	7	5	13	18	11	11	5	9
Depends	61	62	60	64	59	69	63	62	61	61	71	63

While each respondent's decision is based upon a relatively small sample of all possible facilities in the country, such results cannot be interpreted as being meaningful nationally. However, it is possible to say that perceptions of the facility do influence the attender's decision, and that this influence varies from one hall to another.

Audiences were asked to rate the facility in which they were surveyed, the results of which are shown in Table 3.14. It is important to note that if the audience's evaluation of the facility is generally positive, most of the factors seen as important by the general public in making a decision receive relatively low ratings by the audience.

While sound, sight and seating are largely seen as the most important factors by the general public, these factors do not fare that well in the audience evaluation. The view of the stage is rated second with only 41% saying it is "excellent." The quality of the sound follows with 39% saying "excellent" – comfort of seating finishes ninth with a meagre 23% saying "excellent."

Accessibility to the facility, also said to be important by the general public, shows divergent patterns in the audiences. Respondents intercepted in the facilities appeared only relatively satisfied with the ease of getting to facility. Thirty-two percent (32%) rate this as "excellent," but only 19% give that rating to the ease of parking. Parking appears to be a significant issue for many facilities.

The general public indicates that two customer service factors are of particular importance. The first, cleanliness of the hall, gets the most positive assessment from the audience, as close to half (47%) rate it as "excellent." The second most important factor for the general public, washrooms, gets a low rating from the audience (19%), equal to

the assessment given to ease of parking. Beverage services receive lowest rating nationally (12% say "excellent") and in almost every zone, with a low of 4% in New Brunswick. Beverage services also gather the highest percentage of no opinion (32%) of all facilities rating elements, most of them being under 10%. The nonavailability of beverage services may be an explanation for both the low rating and the high percentage of no opinion, however, the quality of services offered must also be considered.

One of the least important features from the general public's point of view – the appearance of the building – is rated as "excellent" by a substantial minority (38%) of audiences. Architecture may not be a "sale" argument, but it seems appreciated by performing arts attenders.

Table 3.14

Audience: RATING ALONG KEY DIMENSIONS OF FACILITY ATTENDING AT TIME OF SURVEY

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
RATING OF FACILITIES						PERCENT SAYING "EXCELLENT"						
Accessibility of the facility												
Ease of getting to facility	32	34	27	29	39	38	27	32	21	26	35	32
Ease of parking	14	25	14	15	23	28	16	18	11	13	21	19
Quality of the hall												
View of stage from seat	36	42	44	46	44	37	36	49	37	43	38	41
Quality of sound	31	42	44	46	44	43	35	44	35	35	36	39
Comfort of seating	19	24	35	26	26	23	20	28	18	23	18	23
Quality of the hall												
Cleanliness of hall	43	52	47	47	50	51	47	49	40	48	45	47
Appearance of building	32	42	38	37	42	42	32	34	39	39	35	38
Ease of access to seats	28	37	26	28	37	38	34	30	24	31	34	32
Quality of house program	21	28	18	28	24	34	27	22	21	24	35	26
Lobby	19	29	24	26	30	31	20	24	21	22	21	25
Washrooms	15	28	22	17	20	22	12	20	14	18	17	19
Beverage services available	10	16	12	14	13	18	4	7	10	14	11	12

Zone variations, as Table 3.14 shows, tend to be minimal. There is some tendency for access, in terms of getting to the facility and parking, to be rated less positively in Toronto and Vancouver, but not in Montréal. While the general public in New Brunswick attribute high importance to washrooms, the audience in this zone assign the poorest rating to their facilities' washrooms. Atlantic respondents also indicate a low rating, though closer to the national average of dissatisfaction for this consumer service.

1.2.9 MOTIVATIONS AND CONSTRAINTS

1.2.9.1 Reasons for non-attendance

GENERAL PUBLIC

Table 3.15

General Public: PERCEIVED BARRIERS TO ATTENDANCE / MORE FREQUENT ATTENDANCE BY ZONE

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
REASONS FOR NON-ATTENDANCE/NOT ATTENDING MORE					PERCENT SAYING "IMPORTANT REASON"							
Ticket price too high	40	51	51	49	51	55	44	43	59	59	64	53
Not enough time	47	59	48	51	50	49	52	48	57	58	55	52
Few performances in community	65	38	59	42	56	51	74	72	36	32	34	49
Not interested in Traditional P.A.	38	45	46	44	47	38	44	46	41	40	34	42
Access to facility too difficult	44	36	50	40	48	40	48	45	33	29	25	39
Little media info available	33	33	31	34	39	27	39	38	35	33	32	34
REASONS FOR NOT ATTENDING MORE OFTEN (THOSE EXPRESSING INTEREST IN ATTENDING MORE FREQUENTLY) PERCENT SELECTING AS AN "IMPORTANT REASON"												
Too expensive	44	64	54	55	56	59	48	48	64	59	63	57
Limited time/ other obligations	29	43	34	34	33	35	31	26	41	44	47	37
Few performances in community	54	28	51	33	42	37	60	58	20	19	13	35
Access to facility too time consuming	18	15	23	16	20	15	15	23	17	15	10	17
Difficult to get information	14	18	12	15	21	9	15	15	18	19	11	16
No one to go with	12	20	15	14	15	8	11	14	19	19	17	15
No facility in community	19	12	22	18	17	11	22	32	8	10	7	14
Don't like being out late	11	14	15	12	10	8	6	6	16	16	14	12
Don't like facility	12	5	4	5	4	5	9	8	6	5	4	5
STATEMENT					PERCENT "STRONGLY" OR "SOMEWHAT" AGREE							
Attend more if more performances in my community	53	28	46	36	43	39	60	57	25	25	23	37
Don't have enough time to attend more	40	48	38	38	44	36	38	38	47	49	39	42

The majority of Canadians express a high degree of interest in attending both traditional and Popular performing arts. This interest appears to run well ahead of actual behaviour. An obvious question is "what do Canadians perceive as barriers to either non-attendance or less frequent attendance." Table 3.15 shows that while all the reasons tested have some importance, there are three reasons in particular that half the population agree are important factors. These are the expense of tickets, limited time, and the limited availability of performances in a community.

Related to availability is the issue of access to the facility, and four-in-ten say this is an important barrier. Interestingly, price, time and availability are more important than attitudes toward the product.

The importance of these three factors – price, time and availability – is confirmed in a set of questions asked only of those expressing an interest in attending some type of performance more frequently. In this instance, as Table 3.15 points out, price is cited much more frequently as a barrier, than time or availability. However, the other two are in turn mentioned more frequently than the other barriers cited.

As expected, there are considerable zonal variations in the importance of various barriers. Price appears to be especially significant in the three major urban centres, but is much less an issue in the Atlantic region generally. Similarly, time appears to be more of a barrier in the three major cities, as well as in Alberta. Availability, on the other hand, is identified consistently as the single most important problem in Atlantic zone and in B.C. outside of Vancouver. Of the eight provincial zones without city zones, five cite lack of availability as the main reason for non-attendance. In the three cities, Alberta, and to a lesser extent Manitoba, availability is not identified as a significant problem by respondents.

Further confirmation of the great differences across zones in the extent to which the availability of performances represents a perceived barrier is found in responses to one of the agree/disagree statements regarding availability. While nationally 37% of Canadians "strongly" or "somewhat" agree that they would attend more performances if there were more available in their community, Atlantic Canadians, as well as British Columbians outside of Vancouver, are well above average in expressing agreement with this position. Similar to other responses dealing with this issue, responses from those in the major cities and Alberta tend to be well below average.

AUDIENCE

As Table 3.16 indicates, audiences are very similar to the general public regarding attitudes toward issues of time and availability. In all, 37% of audiences nationally "strongly" or "somewhat" agree they would attend more performances if more were available in their community. This is the same proportion who state this among the general public.

Similar responses are found among audiences on the issue of time, where 37% also agree they would attend more frequently if they had more time. This is close to the general public figure (42%).

Like the responses from the general public, audiences in the Atlantic region are the most likely to agree that they would attend more if more performances were available.

Saskatchewan and B.C. audiences outside of Vancouver also are well above average in their response to this issue. Québec, including Montréal residents, are well below average and appear to believe more availability would not improve their chances of attending. As well, Québec audiences are well below average in agreeing that with more time available they would attend more perfomances.

Table 3.16

Audience: PERCEPTIONS OF AVAILABILITY AND TIME AS BARRIERS TO ATTENDANCE

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
STATEMENT	PERCENT "STRONGLY" OR "SOMEWHAT" AGREE											
You would attend more performances if there were more performances in your community	48	34	47	38	42	28	61	64	32	25	16	37
You don't have enough time to attend more performances, but you would like to	37	44	42	39	40	20	34	39	46	44	25	37

1.2.9.2 Other Factors Influencing the Decision-Making Process

GENERAL PUBLIC

Canadians, overall, express very little preference for either local or visiting national artists (17%). Half, in fact, say the origin of the performers is not an issue. There is, though, some interest in international artists as one-in-five (19%) express this as a preference.

By zone, there are few substantive differences in preference. The major difference is the somewhat greater preference of Québec residents, outside the Montréal area, for visiting national artists, which is probably due to their interpretation of the word "national" to mean Québec artists and a steady availability of Francophone touring performing arts.

When other factors influencing the decision-making process are considered, it is clear, and not surprising, that the actual piece being performed is the single most important factor considered by the general public. In all, over eight-in-ten say this is "very" or "somewhat" important. The price of tickets follows close behind in importance. The reputation of the company or performer for a high quality production is also considered important with almost two thirds of respondents citing this factor as "very" or "somewhat" important. As Table 3.17 indicates, that the company or performers have a reputation for quality is considered more important than the company or performer.

Another significant factor appears to be the simple desire for an "evening out." Over six-in-ten give this factor some importance. Related to this is the source of information

the public uses in making a decision about what to attend. Word of mouth is cited more frequently than reviews in the media as an important source of information. While four-in-ten Canadians say media reports are at least somewhat important, this is the lowest rating given to any of the factors in Table 3.17. The facility at which the performance is being held also appears to have some significance for at least half the population.

Table 3.17

General Public: RATING OF FACTORS INFLUENCING THEDECISION-MAKING PROCESS FOR ATTENDING A PARTICULAR PERFORMANCE, BY ZONE

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
PERFORMERS/ COMPANY WOULD PREFER TO SEE												
Local	7	7	9	10	8	8	7	12	5	7	12	**8**
Visiting national	11	7	13	9	10	19	13	8	6	4	8	**9**
International	22	17	19	15	17	19	19	16	20	20	18	**19**
No difference	49	56	41	52	51	43	46	49	57	57	53	**51**
Don't know/ No opinion	12	13	18	14	14	11	14	15	13	12	8	**13**
IMPORTANCE OF FACTORS IN DECISION MAKING					PERCENT SAYING "VERY" OR "SOMEWHAT" IMPORTANT"							
	53	54	61	56	54	39	57	61	53	58	46	**52**
Piece being performed	82	84	76	77	80	85	80	79	83	84	85	**82**
Desire for an "evening out"	57	67	60	66	55	66	68	60	63	58	66	**61**
Reviews in media	42	43	44	45	39	36	39	45	49	47	40	**42**
Price of tickets	74	80	80	79	70	71	75	72	82	80	77	**75**
Facility production is being held	55	51	57	54	60	56	63	58	59	55	50	**56**
Word of mouth	62	58	54	60	51	47	61	52	63	60	50	**54**
Familiarity with performance	52	56	57	51	47	39	52	58	52	54	39	**48**
Reputation of company/group	68	67	71	66	62	64	70	68	66	66	59	**65**
Emotionally being moved or touched	52	54	49	53	46	46	53	50	52	52	55	**50**

Zonal variations on factors influencing decision-making are minimal. The major exceptions are the lower level of importance, in both Montréal and the rest of Québec, in terms of the level of familiarity with the work performed and the level of importance assigned to the company or performers in the decision to attend. The implication here is that Québec residents overall may be more prepared to "take a chance" with unfamiliar works and performers than the rest of the country.

Another exception is the greater importance assigned to word of mouth comments in British Columbia, both in Vancouver and elsewhere in the province.

AUDIENCE

When audiences are considered in terms of factors influencing decisions about attending, responses are, in most instances, quite similar to those found among the Canadian public overall. There is no strong preference among audiences for local or visiting national performers. In all 22% (up from 17% among the general public) indicate a preference for seeing Canadian talent. Generally, zonal differences in preference are minimal. Again, the number one factor that emerges across all zones is the piece being performed.

Table 3.18

Audience: RATING OF FACTORS INFLUENCING DECISION-MAKING PROCESS FOR ATTENDING A PARTICULAR PERFORMANCE, BY ZONE

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
WOULD PREFER TO SEE PERFORMERS FROM:												
Local company	8	8	10	14	8	8	6	12	9	10	14	10
Visiting national company	13	12	14	9	16	20	17	15	8	8	8	12
Visiting international company	13	11	10	9	14	8	15	10	19	15	10	12
No difference	58	61	56	60	55	58	57	56	58	61	63	58
Don't know/ No opinion	8	8	9	9	7	6	5	7	7	7	6	7
IMPORTANCE OF FACTORS IN DECISION-MAKING					PERCENT SAYING "VERY" OR "SOMEWHAT" IMPORTANT							
Comp./group of performers	71	74	76	67	78	72	78	79	80	78	73	76
Piece being performed	89	88	90	87	91	91	90	90	91	92	95	91
Desire for an "evening out"	53	58	54	58	50	48	49	52	46	45	50	51
Reviews in media	53	47	54	54	49	41	48	53	55	48	37	48
Price of tickets	76	75	78	76	77	70	69	69	79	77	72	75
Facility production is being held	60	58	57	56	62	48	56	62	57	56	43	56
Word of mouth	67	66	66	65	60	39	56	54	63	67	39	68
Familiarity with performance	51	54	53	54	55	57	60	52	53	45	53	53
Reputation of company/group	80	78	80	64	80	65	75	79	80	78	62	75
Specific performers in production	59	63	63	54	68	78	64	62	68	69	74	67

In terms of other factors influencing decisions to attend, while many of the same issues are important, there are two areas of significant differences.

Clearly, who the performers are and their reputation for quality, are significantly more important for audiences than for the general public. Who the performers are, is especially important to audiences – 76% compared with 52% among the general public say this is "very" or "somewhat" important in their decision-making process.

While there are some zonal variations indicated in Table 3.18, the major variations occur between Québec and the rest of Canada. There are three main areas of difference. First, the concern about the reputation of the performers for quality is less significant in Québec than elsewhere. Second, the facility and how it is evaluated also appears to be less significant as a factor to be considered by Québec audiences than other Canadians. Third, both reviews in the media and word of mouth comments about a production are also rated as being less important in Québec. Elsewhere variations are minimal.

A COMPARISON

A comparison suggests that for the same product, arts marketers may find it advisable to adopt different approaches if the goal is to attract more of the current audience, or if the goal is to attract new attenders. Potential audiences and the general public give different ratings and rankings to similar factors influencing their decision to attend a particular performance.

Table 3.19

General Public and Audience:
A COMPARISON OF FACTORS INFLUENCING DECISION-MAKING PROCESS FOR ATTENDING PERFORMANCEs

	Audience		General Public	
PERFORMANCE RELATED FACTORS	%	Rank	%	Rank
Piece being performed	91	1	82	1
Company/group of performers	76	2	52	7
Reputation of company/group	75	3	65	3
Familiarity with performance	53	7	48	8
CONTEXTUAL FACTORS				
Price of tickets	75	4	75	2
Desire for an evening out	51	8	61	4
OTHER FACTORS				
Word of mouth	68	5	54	6
Facility production is being held	56	6	56	5
Reviews in media	48	9	42	9

Although both agree that the piece being performed is the most important factor, audiences tend to put more emphasis on reasons that relate to the performance itself and imply a certain knowledge of the artistic domain (the company, previous knowledge of the production and their reputation), while the general public indicates being more motivated by contextual factors, such as the desire for an evening out. Price can be associated with the latter contextual factor. Although equal in percentage for both groups, it is ranked a close second by general public and a more distant fourth by audiences.

Further, 75% of audiences, compared with 65% of the general public, say the performers' reputation for putting on a high quality production is important in their decision to attend. This suggests that regular patrons of the performing arts are much more likely to consider the performers involved, compared with those who attend infrequently, where the work plays a greater role in the decision-making process.

Word of mouth, and to a lesser extent, reviews in media are a stronger motivation for audiences compared with the general public, which is again, somewhat related to a certain knowledge of the artistic domain.

In all, 63% of audiences, compared with 54% among the general public say word of mouth is at least somewhat important. Interestingly, while reviews in the media are more significant for audiences than for the general public, only 48% (the lowest rating of the set of factors) say it is an important consideration.

The facility, as noted previously in this chapter, can be an important factor affecting the quality of experience for an audience, and thus, from a marketing point of view, to keep the audience returning.

However, on a national basis, the facility factor is given the same, relatively unimportant ranking by both the audience and the general public when deciding to attend a performance. This is not surprising, given that in smaller markets there are few choices between halls, and in larger urban centres, few choices between specialized halls (presenting for example opera, ballet, symphonic music). From the marketing aspect, therefore, it would seem that only exceptional facilities will have a positive, or a negative, influence on the decision-making process.

Table 3.19 demonstrates the stronger reactions from the audiences for the four performance related factors, from 53% for familiarity with performance to 76% for company/group of performers. Respondents from the general public rank desire for an evening out as fourth while audiences rank it only second to last.

1.2.10 Pricing issues

1.2.10.1 General Public

Among those attending a traditional or Popular performance within the previous six months or so, the amount paid for a ticket for the last performance attended varies considerably. Fully one quarter report paying less than $10 for a single ticket, while 45% report paying less than $15. Few (7%) report paying $65 or more. The average (mean) amount is $23, while the median is $18.

The price paid, though, does depend to a significant degree on the type of performance attended, as Table 3.20 shows.

These averages are considerably higher than Canadians overall say they would normally be prepared to pay for a specific type of performance. The highest averages are only $20 for theatre and $22 for a pop/rock concert. Opera and musicals, often with higher tickets prices, were not the specific object of the question as asked. We must also be aware of having asked the question during a recessionary period in the Canadian economy, and during the year in which the new Goods and Services Tax was introduced. This would suggest a more conservative and honest response than might have ocurred in a stronger economy. Nonetheless, there are considerable variations in responses as generally, more frequent attenders are clearly prepared to pay more. However, the implication of these low averages is clear. Potential audiences are not prepared to pay very much for an experience that is relatively unfamiliar to them.

Table 3.20

General Public: TICKET PRICES PAID AND PREPARED TO PAY, BY ZONE

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
AMOUNT PAID FOR LAST PERFORMANCE ATTENDED												
Dollar Average	$22	$20	$18	$19	$26	$17	$15	$14	$26	$31	$24	**$23**
Gift	8	11	7	5	11	8	8	7	12	15	14	**11**
AMOUNT NORMALLY PREPARED TO PAY FOR SINGLE TICKET												
Dance:												
Dollar average	$15	$14	$13	$13	$20	$11	$11	$11	$17	$20	$15	**$16**
Not interested	21	30	26	31	32	26	23	27	30	30	26	**28**
Theatre:												
Dollar average	$18	$18	$15	$16	$24	$16	$14	$14	$21	$29	$18	**$20**
Not interested	7	9	17	12	11	4	12	7	6	6	5	**8**
Classical music:												
Dollar average	$16	$18	$14	$16	$20	$15	$16	$15	$20	$23	$19	**$19**
Not interested	29	32	39	33	31	35	35	42	28	30	26	**32**
Jazz/blues:												
Dollar average	$15	$15	$13	$14	$17	$12	$13	$14	$16	$17	$15	**$15**
Not interested	32	35	43	36	36	37	36	36	34	28	30	**34**
Folk music:												
Dollar average	$12	$14	$12	$13	$16	$10	$12	$13	$14	$15	$12	**$13**
Not interested	31	34	32	31	39	43	26	27	40	39	45	**38**
Pop/rock:												
Dollar average	$21	$21	$18	$20	$27	$18	$18	$20	$24	$24	$19	**$22**
Not interested	26	21	28	20	25	19	16	16	22	20	19	**21**
Child music/theatre:												
Dollar average	$8	$10	$9	$9	$11	$10	$9	$9	$9	$12	$10	**$10**
Not interested	34	35	40	31	39	30	29	31	38	40	32	**35**
Professional sports:												
Dollar average	$20	$20	$17	$17	$20	$17	$16	$17	$19	$21	$16	**$19**
Not interested	22	16	18	22	23	26	23	19	25	20	23	**22**

Table 3.20 provides some parameters for the size of potential audiences for various performing arts by indicating the proportion of the population who say they are not interested in attending or would pay nothing to attend a specific performance type. This ranges from a national high of 32% for classical music to a low of 8% for theatre among the Traditional performing arts. Theatre is clearly of great interest for many in the public, and as noted above, Canadians are prepared to pay more for a ticket to the theatre than for other Traditional performing arts, again indicating greater interest in theatre relative to dance and classical music.

Among the Popular performing arts, the extremes of interest are not so apparent. A third or more indicate no interest in jazz/blues (34%) and folk music (38%), while a fifth (21%) show no interest in attending pop/rock performances. The fact that the two performance types with the greatest expression of interest – theatre and pop/rock – are also the performance types that Canadians are prepared to pay most for a ticket, suggests as well that ticket price "prepared to pay" may be seen as an indication of respondents' interest toward types of product.

In general, compared with elsewhere in the country, Ontario residents appear to have paid the highest amount for their most recent ticket and seem prepared to pay more for a single ticket for a performance. This willingness to pay appears to be especially the case with theatre in Toronto, where the mean of $29 is above the $20 national average. The strong presence of musicals – that respondents may have associated with theatre – and commercial non-funded theatre in this market, may explain the willingness to pay more as such productions tend to be more expensive than average theatre performances. In what may be a side effect of respondents' familiarity with Toronto's higher prices, respondents from Ontario rank second in a willingness to pay (21%), ahead of Vancouver (19%) and Montréal (18%).

Atlantic residents, on the other hand, appear to have paid the lowest amount for their most recent ticket, but are like residents of many other zones in terms of what they are prepared to pay.

1.2.10.2 Audience

The average dollar figure cited by audiences ($22) as the amount they paid for a single ticket is very close to the mean cited by the public ($23). Far fewer audience members report paying less than $10 for a ticket (13%) and more report spending between $10 and $15 (18%), or between $15 and $20 (21%). Like the public, few (3%) report spending $50 or more for a single ticket.

As expected, audience members are prepared to pay somewhat more than the general public for a ticket to a Traditional performing arts event (see Table 3.21). For example, the average amount audiences are prepared to pay for a dance performance is $19, compared with $16 among the public overall.

Table 3.21 shows that, unlike the general public, audiences appear ready to spend nearly as much on a ticket for the theatre as classical music ($21 versus $20). Interest in attending both types of performances is also high.

Interest in attending Popular performing arts events is similar for both audiences and the general public. The sole exception is the lower level of interest and low ticket price prepared to pay among audiences for pop/rock.

Zonal variations in the amount prepared to pay for a single ticket are limited. Once again Ontarians, and especially Torontonians, appear prepared to pay a higher amount than other Canadians for Traditional performing arts tickets. Elsewhere, differences are not great.

Table 3.21

Audience: TICKET PRICES PAID AND PREPARED TO PAY, BY ZONE

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
AMOUNT PAID FOR LAST PROFESSIONAL PERFORMANCE ATTENDED												
Dollar average	$18	$22	$23	$24	$22	$22	$18	$15	$21	$25	$25	**$22**
Percent saying gift	3	3	2	2	2	1	5	3	2	2	5	**3**
AMOUNT NORMALLY PREFERRED TO PAY FOR SINGLE TICKET												
Dance:												
Dollar average	$16	$17	$16	$18	$21	$15	$15	$16	$20	$24	$18	**$19**
Not interested	12	12	13	14	15	19	10	15	12	11	14	**13**
Theatre:												
Dollar average	$19	$19	$17	$20	$24	$17	$18	$18	$20	$27	$20	**$21**
Not interested	3	3	4	3	3	4	2	3	2	2	2	**3**
Classical music:												
Dollar average	$18	$19	$17	$19	$22	$18	$17	$18	$22	$26	$20	**$20**
Not interested	8	9	10	13	8	16	9	9	4	6	11	**9**
Jazz/blues:												
Dollar average	$14	$16	$14	$16	$18	$15	$14	$15	$16	$18	$16	**$16**
Not interested	29	23	31	23	32	34	24	25	26	29	26	**29**
Folk:												
Dollar average	$13	$14	$12	$14	$16	$13	$12	$14	$14	$16	$14	**$14**
Not interested	28	23	24	22	32	43	24	18	29	37	47	**32**
Pop/rock:												
Dollar average	$18	$19	$16	$19	$21	$18	$16	$17	$19	$21	$19	**$19**
Not interested	32	27	36	28	38	29	26	29	40	39	29	**34**
Children's program:												
Dollar average	$10	$11	$9	$11	$13	$9	$10	$10	$11	$14	$11	**$11**
Not interested	39	33	36	37	42	32	34	33	41	40	37	**38**

It must be pointed out that as a whole, the audiences' results have a limited applicability, being a collage of answers given by respondents for 18 different types of products. A regular theatregoer is willing to pay more for theatre than for folk music, and a pop/rock attender may find very little interest in paying a lot of money to attend a ballet performance. Therefore, the average price prepared to pay for a certain type of product is probably lower than the price regular audiences of the same type of product will be prepared to pay. These dollar figures though, do provide a guide as to the amount that would need to be charged for single tickets for each discipline in order to reach beyond the core audience and to broaden the audience base.

Table 3.22 illustrates the attenders' willingness to pay more. In the audience short questionnaire, attenders were asked if they would have attended the same performance if the tickets cost more.

There appears to be some willingness to pay more for a ticket, although the potential increase appears modest. While Table 3.22 indicates that only 5% say they would be prepared to pay an additional $10 or more to attend the performance at which they were surveyed, one quarter say they would be prepared to pay $2 more. In fact, when those citing larger amounts are added, 73% report being prepared to pay $2 more for a ticket.

Table 3.22

Audience: ADDITIONAL AMOUNT PREPARED TO PAY, BY ZONE

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
WOULD ATTEND IF TICKET PRICES WERE HIGHER BY:						PERCENT SAYING "YES"						
$2.00	33	28	30	25	28	31	23	32	29	23	25	**28**
$4.00	20	21	17	19	22	21	21	22	21	20	21	**21**
$6.00	7	8	7	10	10	10	12	11	8	12	10	**10**
$10.00	10	13	10	13	14	17	23	13	11	16	18	**14**
No	20	20	23	20	17	16	11	13	21	17	16	**17**
No opinion	10	11	12	12	10	6	10	10	10	12	9	**10**

Clearly, 73% of Canadians are willing to incur a price increase, whereas 27% are not or do not have an opinion. Variations of interest and willingness to pay more per type of performing arts product are found in Chapter 4.

1.2.11 CHILDHOOD EXPERIENCES

Respondents from the general public were asked if they recalled attending theatre, dance, classical music and children's productions (as in theatre, dance or music for children) when they were under 16 years old. As Table 3.23 shows, theatre and children-oriented productions were attended by a little more than half of all Canadians, while dance (38%) and classical music (27%) were attended by a lesser proportion of respondents. As many as 24% did not answer this question, which suggests they did not recall attending any such performances in their youth.

Variations by zone indicate that Montrealers, and, though to a lesser extent, other Québecers, were more likely to recall attending theatre and children-oriented productions. Residents of Vancouver and Toronto, followed by British Columbia and Alberta, are also more likely to recall attending. Comparatively, there is less zonal variation in recalled dance attendance.

Vancouver and Toronto residents are notably more likely to recall attending classical music performances in their childhood, followed by residents of British Columbia, Montréal and Alberta.

Zonal variations also emerge among respondents who did not recall attending a performance in their childhood. Saskatchewan has the most "non-recallers" (34%), followed by Manitoba (27%), Ontario (27%), New Brunswick (26%) and the Atlantic region (25%). These zones show a lower than average number of respondents who recall attending theatre, children-oriented productions, dance and classical music.

Table 3.23

General Public: RECALLED ATTENDANCE WHEN YOUNGER THAN 16 YEARS OLD

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
Theatre	60	60	47	48	56	60	50	54	61	61	67	**57**
Children's theatre, dance or music	59	53	42	46	51	55	47	48	57	57	57	**52**
Dance	43	41	35	34	34	38	35	33	39	41	41	**38**
Classical music	32	29	20	25	26	25	18	18	36	36	30	**27**
Did not mention recalling attendance when young	21	22	34	30	27	20	26	25	21	20	18	**24**

When confronted with declared and intended attendance for the Traditional performing arts, there is a systematic correlation. That is, a higher than average percentage of respondents not recalling attendance while young corresponds with a higher than average percentage of non-attendance for the Traditional performing arts and a lower than average degree of interest toward the same products. In other words, zones with larger proportions of respondents who do not recall attending while young – and presumably did not attend – also have higher proportions of respondents who do not presently attend and smaller proportions who express an interest in attending.

Table 3.24

General Public: COMPARISON BETWEEN RECALLED ATTENDANCE WHEN YOUNG, AND DECLARED & INTENDED ATTENDANCE FOR THE TRADITIONAL PERFORMING ARTS

	B.C.	ALTA.	SASK.	MAN.	ONT.	QUÉ.	N.B.	ATL.	VAN.	TOR.	MTL.	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
Did not mention recalling attendance when young	21	22	34	30	27	20	26	25	21	20	18	**24**
Above/under national average	-	-	+	+	+	-	+	+	-	-	-	=
Never attended Traditional performing arts	33	28	48	40	37	26	46	52	28	22	23	**32**
Above/under national average	+	-	+	+	+	-	+	+	-	-	-	=
Interested in attending more Traditional performing arts	65	67	49	59	60	65	54	54	72	69	70	**64**
Above/under national average	+	+	-	-	-	+	-	-	+	+	+	=

Table 3.25

General Public: % OF RESPONDENTS RECALLING ATTENDANCE WHO ENJOYED THE EXPERIENCE

ENJOY	TOTAL
	%
Theatre	93
Children's theatre, dance or music	93
Dance	86
Classical music	80

Respondents who recalled attendance when young were also asked if they enjoyed the experience. Results are overwhelmingly favourable (Table 3.25). While most respondents indicate that they enjoyed theatre and children-oriented productions (93 %). Fewer, though still an overwhelming majority, enjoyed dance (86%) or classical music (80%).

There are only a few noticeable zonal variations. With respect to theatre and children-oriented productions, variations are minimal. Compared with residents of Toronto (90%) or the Atlantic zone (90%), residents of Manitoba (82%) are less likely to report having enjoyed attending a dance performance in their childhood. Stronger zonal variations emerge with respect to classical music. Residents of Vancouver (84%), Ontario, outside of Toronto (85%), and Toronto (87%) are notably more likely to recall having enjoyed the performance of classical music they attended as a child, while residents of Saskatchewan (68%) and New Brunswick (64%) are less likely.

2 THE 11 ZONES

2.1 British Columbia outside Vancouver, including the Yukon

2.1.1 PSYCHOGRAPHICS, BEHAVIOUR AND INTENTION

Table 1 — Psychographic Segments

VALUES TOWARD THE ARTS

	B.C.	NATIONAL AVERAGE
	%	%
Devoted	5	8
Believers	23	17
Practitioners	18	14
Conditionals	15	18
Uncommitted	16	14
Uninvolved	14	17
Carefree Pop/Rockers	4	6
Tuned Out	5	6

British Columbians living outside of the Vancouver area have nearly as positive views toward the arts as Vancouver residents, unlike residents of Ontario and Québec who live outside of the two major cities.

Nearly one quarter (23%) of British Columbians can be characterized as Believers compared with 17% of Canadians overall. This suggests British Columbians have quite idealized views about the arts, and a strong interest in the performing arts.

Further, while the area outside of the Lower Mainland has a larger than average population with a strong interest in the arts, there are fewer of the Uninvolved, that is those who have very limited interest in the performing arts. Only 14%, compared with 17% among the population overall, fall into this category.

British Columbians living outside of Vancouver are at the national average in terms of their level of attendance at Traditional performing arts, but there is considerable variation by community size (Table 2). As Table 2 makes clear, those living in communities of 100,000 or more (excluding Vancouver) are well above the national average in reported attendance at Traditional performing arts events. Close to six-in-ten report attendance in the last six months, while nearly half of this group (well above the national average) report an interest in attending more frequently. At the same time, those living in smaller communities (below 100,000) also report a somewhat above average attendance at Traditional performances. Thus, even in communities of less than 10,000 people, over one-in-ten report attendance at a Traditional performing arts event, and close to three-in-ten from this group say they would like to attend more performances.

Reported Popular performing arts attendance is closer to the national average (see Table 2), although those in larger communities (in excess of 100,000) report above average attendance. Table 2 also indicates that, unlike the pattern for the Traditional performing arts, there is only a limited drop in reported attendance as community size decreases for Popular performing arts. This could be due to the factor of availability of the respective performance types in various sizes of communities.

Table 2

General Public: B.C. Outside of Vancouver
COMMUNITY SIZE VARIATIONS IN ATTENDANCE PATTERNS & INTEREST IN ATTENDING MORE TRADITIONAL & POPULAR PERFORMING ARTS

	100,000 or more %	10,000 to 99,999 %	Under 10,000/rural %	Zone average %
ATTENDANCE/TRADITIONAL PERFORMING ARTS				
Attended last six months	59	46	38	46
Attended last five years	18	23	20	21
Never attended	23	31	42	33
INTEREST IN ATTENDING MORE TRADITIONAL PERFORMING ARTS				
Attended last six months:				
Interested	49	36	29	36
Content	10	10	8	9
Attended last five years:				
Interested	14	18	13	36
Content	4	5	7	6
Never attended:				
Interested	12	12	17	13
Content	11	19	25	19
ATTENDANCE/POPULAR PERFORMING ARTS				
Attended last six months	58	52	49	52
Attended last five years	21	20	28	22
Never attended	21	28	22	25
INTEREST IN ATTENDING MORE POPULAR PERFORMING ARTS				
Attended last six months:				
Interested	47	45	42	45
Content	11	7	7	8
Attended last five years:				
Interested	15	15	20	17
Content	6	4	8	6
Never attended:				
Interested	10	13	12	12
Content	11	15	11	13

2.1.2 PRODUCT AVAILABILITY

2.1.2.1 Inventoried Product Availability

Table 3

Pop. (000) 1,300,1	Inventoried Facilities 13	Inventoried Performances 90/09-91/06 639
% of Total 6	% of Total 4	% of Total 3

British Columbia outside Vancouver (including the Yukon) has 6% of the total Canadian population over 16 years of age, 4% of the total number of inventoried professional performances and 3% of the total number of inventoried active professional facilities.

Victoria was the best served centre and accounted for 53% (339) of the inventoried professional performances in the zone, followed by Kamloops with 16% (105) and Whitehorse, Yukon with 11% (67). The remaining 128 inventoried professional performances were spread over six other centres, each with an average of 21 presentations during the season.

It should be noted, however, that volunteer presenters in small communities who do not have access to professional facilities have not been inventoried to any great degree.

4. CAPACITY	
< 400	4
400-800	7
800-1200	1
> 1200	1
Total	13

5. COMMUNITY SIZE	
5,000-10,000	38
10,000-100,000	23
> 100,000	1
Total	62

6. INVENTORIED PERFORMANCES FALL-WINTER-SPRING 1990-91

Type	Performances	% of national
Ballet	14	5%
Contem.dance	10	2%
Dance%	**24**	3%
Th. comedy	206	5%
Th. drama	132	3%
Th. av-garde	1	0%
Theatre%	**339**	3%
Opera%	**10**	4%
Symph. music	32	6%
Symph. "pop"	11	7%
Chamber mus.	20	4%
Contem. class.	4	3%
Choral music	9	5%
Classical%	**76**	5%
Traditional%	**449**	4%
Pop/rock	14	2%
Comedy	8	1%
Folk music	7	3%
Musicals	41	2%
Jazz/blues	17	7%
Count.& west.	2	3%
Popular %	**89**	3%
Child prod.	85	3%
Ethnic/herit.	16	8%
Other%	**101**	3%

The majority of the inventoried active professional facilities in British Columbia, outside Vancouver were of an appropriate size (less than 800 seats) for presenting small to medium sized productions such as chamber music, experimental theatre and dance, young public productions, theatre and Popular performing arts.

One active professional facility of more than 1,200 seats was inventoried in this zone. This capacity is normally required for larger scale performing arts products, such as opera, ballet and symphonic music. The facility is located in Victoria, the one market in British Columbia of more than 100,000 people, other than Vancouver.

As inventoried, the *Traditional performing arts* in British Columbia offered the most opportunities to view a performance, with 449 of the total 639 performances falling into this category. Overall, 50% of these occasions were theatre presentations. The inventory for professional avant-garde theatre, though inconclusive, would appear to indicate few opportunities for British Columbians living outside of Vancouver to view avant-garde theatre in a professional facility during the surveyed season.

Again, while not conclusive, dance, with 24 inventoried professional performances and classical music, with 76, would also appear to indicate less than average viewing opportunities for these disciplines in professional facilities during the season.

Popular performing arts were not a significant part of the inventoried distribution network, and this inventory is not indicative of their availability in the commercial club network.

2.1.2.2 Perceived Product Availability

The majority of residents among the general public in British Columbia feel they have insufficient opportunities to attend performing arts presentations. Over 50% of these respondents also indicate that they would attend more performances if there were more available.

British Columbians living in smaller communities of under 10,000 are more likely to feel this lack of opportunity, with over 70% indicating "few performances in community" as a reason for not attending more performances. This perception is somewhat less pronounced among the audience members surveyed, although not significantly.

Theatre, both drama and comedy, are most often perceived to be "frequently" or "occasionally" available, and this frequency is confirmed, relative to the inventoried availability of other performing arts in British Columbia. Ballet, avant-garde theatre and opera performances are perceived to be the least available of Traditional performing arts. This survey's inventory would suggest some support of the perception of the limited availability of avant-garde theatre, and also of professional performances of ballet or opera outside of Victoria.

Overall, the majority of respondents believe the Popular performing arts to be reasonably accessible. While this availability cannot be not substantiated by the inventoried distribution network, it is expected that most pop/rock, jazz/blues, folk and country and western performances occurred in the commercial club market.

2.1.3 Perception of Facilities

Among Canadians overall, the influence of the facility when deciding to attend a performance can be both positive and negative, depending on the facility. Of all the 11 zones, however, British Columbia's general public are the most decisive; they were more likely than respondents elsewhere in Canada to say that the influence of the facility had a negative influence on their decision to attend.

More likely than elsewhere in Canada to say their decision to attend is frequently influenced by the facility, in British Columbia, audiences are even less likely than the general public to be positively influenced by the facility (17% for surveyed audiences, 22% for the general public).

The quality of sound at the performance is of greater importance to British Columbia residents than to the rest of Canadians in their decision to attend a performance, by a notable 7% margin. Furthermore, the general public of this zone are more likely to rank the quality of sound slightly above the view of the stage, which is generally ranked first.

Consistently, British Columbia audiences tend to rate the features of the facilities they attend less positively than the average Canadian. The quality of sound, which seems particularly important to the general public of this zone, was perceived as "excellent" by a smaller proportion compared with elsewhere in Canada (31% versus 39%). As well, a smaller proportion rate the view of the stage as "excellent."

As for customer services, residents of British Columbia differ from the national average only in that they consider the ease of access to seats and especially the quality of the house program, as less important for decision-making than elsewhere in Canada (respectively, 8 and 12 points under the national average).

Lower than average ratings from British Columbia audiences were recorded regarding the appearance of the building (32% compared with a national average of 38%), most customer service features including the lobby (19%, 25%) and the quality of the house program (21%, 26%). Facility managers in British Columbia should note that washrooms, as a customer service element, were rated as "poor" by a relatively important proportion of audiences (11%) when compared with the national average (only 3%).

British Columbia's general public, like other Canadians, considers access to the facility (ease of getting to the facility and ease of parking) as the second most important factor in their decision to attend a performance. However, it seems of less importance to them than the average Canadian as both access factors rank five points below the national average. Ease of parking is, in fact, ranked lower in British Columbia than anywhere else in Canada, with only 34% considering it "very" important.

While access is a comparatively unimportant issue for British Columbia's general public, British Columbia audience members rated ease of parking as "excellent" slightly less than the national audience.

2.1.4 Attending Motivations and Constraints

The general public and the audience living in British Columbia outside of Vancouver have many points in common with the rest of the country, but a major distinction is their reaction to the issue of product availability as a constraint. "Few performances in the community" is cited by 65% of the general public in British Columbia as an important reason for non-attendance, compared with 49% nationally.

Furthermore, among the general public who would like to attend performances more often, over half (53%) agree "strongly" or "somewhat" that they would attend more frequently, if more performances were offered in their community, well above the national average of 37%. Only in New Brunswick (60%) and the Atlantic zone (57%) does this intention, given increased product availability, emerge as strongly.

Two reasons for not attending performances more often are rated by British Columbia residents significantly below national levels – tickets are too expensive (only 44% of British Columbia's general public compared with 57% of Canadians) and other obligations (29% compared with 37%). It would seem that price and other activities are less of an attendance constraint than availability, for most British Columbians. Already low in B.C. overall, price as a factor of importance tends to diminish with the size of the community.

With respect to factors influencing the decision to attend, while there are few exceptions to national averages, marketing strategies will benefit from considering that 62% of this zone's general public (compared with 54% nationally) declare word of mouth reactions to a performance as "very" or "somewhat" important.

Audiences in British Columbia differ only slightly from those elsewhere in considering the importance of decision-making factors. Both the performance company and the specific performers in the production are rated only five points less than they are rated nationally.

The reputation of the performing company, given a high rating nationally (75%), is considered an even more important influence for audiences in B.C. (80%) when deciding to attend a performance. Reviews in the media (53% versus 48% for Canada), and also the particular facility which presents the performance (60% versus 56%) are of somewhat greater importance to British Columbia's audiences.

2.1.5 Pricing Issues

Prices paid by audiences in British Columbia, outside Vancouver, for single tickets for the performance at which they were surveyed, are somewhat lower than for all audiences ($18 versus $22). However, variations between British Columbia's general public and Canadians overall, in terms of the amount paid for the last professional performance attended, indicate that B.C. residents paid close to the national average ($22 versus $23).

In terms of the amount prepared to pay for a specific performance type, B.C. audiences are virtually identical to audiences in general when looking at each performance type surveyed. Among the general public though, B.C. residents are often prepared to pay more than Canadians overall. This is the case for dance, classical music, jazz/blues, folk, pop/rock and children's performances.

While the B.C. public report paying more for a single ticket to the last performance they attended than audiences, both groups are quite similar in terms of the amount they are prepared to pay for each performance type. These amounts are usually well below the amounts reported as actually paid for a single ticket, as Table 7 shows clearly for each community size. The main reason for this discrepancy is that in reporting the amount paid for a ticket, audience and public alike are paying for specific types of performances they want to attend. When citing a figure for the amount they are prepared to pay for specific performance types, audiences and the general public are citing dollar values for performances in which they may or may not be greatly interested. What the figures in Table 7 provide, in fact, is the cost that tickets would need to be in order to reach a broad audience, over and above a core group of attenders.

Community size variations in amount prepared to pay show few differences for audiences, but indicate that the general public in rural communities are generally prepared to pay less for each performance type.

Table 7

**British Columbia Outside of Vancouver:
TICKET PRICES PAID & PREPARED TO PAY**

	COMMUNITY SIZE					
	100,000 or more %		10,000 to 99,999 %		Under 10,000/Rural %	
	GP	AUD.	GP	AUD.	GP	AUD.
AMOUNT PAID FOR LAST PROFESSIONAL PERFORMANCE ATTENDED						
Dollar average	$21	$19	$24	$18	$16	$19
Gift	9	5	8	2	4	6
AMOUNT NORMALLY PREPARED TO PAY FOR SINGLE TICKET						
Dance:						
Dollar average	$15	$18	$15	$16	$13	$15
Not interested	23	12	23	11	16	19
Theatre:						
Dollar average	$17	$20	$19	$19	$18	$18
Not interested	7	4	8	2	5	3
Classical music:						
Dollar average	$17	$19	$16	$16	$17	$19
Not interested	19	3	28	14	38	10
Jazz/blues:						
Dollar average	$14	$15	$16	$14	$15	$13
Not interested	26	36	31	22	36	34
Folk music:						
Dollar average	$12	$12	$13	$14	$12	$12
Not interested	40	40	32	16	24	26
Pop/rock:						
Dollar average	$19	$16	$21	$18	$20	$16
Not interested	31	45	22	15	29	39
Child music/theatre:						
Dollar average	$9	$11	$8	$9	$7	$9
Not interested	41	49	31	29	36	34
Professional sports:						
Dollar average	$18		$19		$22	
Not interested	34		22		16	

2.2 Alberta

2.2.1 PSYCHOGRAPHICS, BEHAVIOUR AND INTENTION

Table 1 — Psychographic Segments

VALUES TOWARD THE ARTS

	ALTA.	NATIONAL AVERAGE
	%	%
Devoted	10	8
Believers	18	17
Practitioners	18	14
Conditionals	14	18
Uncommitted	14	14
Uninvolved	15	17
Carefree Pop/Rockers	6	6
Tuned Out	6	6

Psychographic segmentation for Alberta indicates that Albertans are slightly more likely to be represented in the first two segments, namely the Devoted and Believers (28% versus 25% nationally), and slightly less in the following two groups of Practitioners and Conditionals. In other words, Alberta has a higher than average proportion of those interested in the performing arts and a somewhat lower proportion of those who either have a more ambiguous orientation or who seek lighter entertainment and "hit" shows.

Residents of Alberta are very much in line with national figures for attendance of Traditional performing arts, but, as with British Columbians, variations by community size are once again present (Table 2).

Slightly more than half of those living in communities of 100,000 or more report attendance at Traditional performing arts events within the last six months. Of those living in larger communities, slightly less than half indicate that they would like to attend such events more frequently.

In the smaller Alberta communities, that is those with populations of under 100,000, reported attendance at Traditional performing arts events closely mirrors the national figures. In Alberta's mid-sized communities (10,000 to 99,999), more than one third indicate an interest in attending more Traditional performing arts events.

A majority of residents of both Alberta's largest centres and its smallest centres indicate that they have attended a Popular arts event within the past six months. As Table 2 shows, more than half of the residents of Alberta's larger communities (over 100,000) are interested in attending more Popular performing events.

Table 2

General Public: Alberta

COMMUNITY SIZE VARIATIONS IN ATTENDANCE PATTERNS & INTEREST IN ATTENDING MORE TRADITIONAL & POPULAR PERFORMING ARTS

	100,000 or more %	10,000 to 99,999 %	Under 10,000/rural %	Zone average %
ATTENDANCE/TRADITIONAL PERFORMING ARTS				
Attended last six months	54	44	35	47
Attended last five years	27	17	21	24
Never attended	20	39	44	28
INTEREST IN ATTENDING MORE TRADITIONAL PERFORMING ARTS				
Attended last six months:				
Interested	46	37	27	39
Content	8	7	9	8
Attended last five years:				
Interested	21	11	16	18
Content	6	6	5	6
Never attended:				
Interested	8	9	15	10
Content	12	30	29	19
ATTENDANCE/POPULAR PERFORMING ARTS				
Attended last six months	60	43	54	57
Attended last five years	26	33	21	25
Never attended	14	24	24	18
INTEREST IN ATTENDING MORE POPULAR PERFORMING ARTS				
Attended last six months:				
Interested	54	39	48	50
Content	6	4	6	6
Attended last five years:				
Interested	20	28	20	21
Content	6	6	1	5
Never attended:				
Interested	7	9	12	9
Content	7	15	13	10

2.2.2 PRODUCT AVAILABILITY

2.2.2.1 Inventoried Product Availability

Table 3

Pop. (000)	1,890	Inventoried Facilities	25	Inventoried Performances 90/09-91/06	1,914
% of Total	9	% of Total	7	% of Total	10

Alberta, with 9% of the Canadian population over 16 years of age, had 10% (1,914) of the total number of inventoried professional performances

Of the 1,914 performances, 93% (1,782) were offered in the 17 inventoried active professional facilities in Edmonton and Calgary. The remaining 132 were distributed through 8 facilities in five different localities, averaging 17 performances per facility during the season. Smaller community presenters with no access to professional facilities have not been inventoried.

4. CAPACITY	
< 400	9
400-800	12
800-1200	1
> 1200	3
Total	25

5. COMMUNITY SIZE	
5,000-10,000	45
10,000-100,000	4
> 100,000	2
Total	51

6. INVENTORIED PERFORMANCES FALL-WINTER-SPRING 1990-91		
Type	**Performances**	**% of national**
Ballet	25	9%
Contem. dance	63	15%
Dance%	**88**	**12%**
Th. comedy	710	17%
Th. drama	497	11%
Th. av-garde	29	2%
Theatre%	**1236**	**13%**
Opera%	**18**	**7%**
Symph. music	37	7%
Symph. "pop"	20	13%
Chamber mus.	19	3%
Contem. class	1	1%
Choral music	14	8%
Classical%	**91**	**6%**
Traditional%	**1,433**	**12%**
Pop/rock	18	3%
Comedy	22	4%
Folk music	20	10%
Musicals	147	9%
Jazz/blues	26	10%
Count.& west.	11	17%
Popular%	**244**	**7%**
Child prod.	219	7%
Ethnic/herit.	18	9%
Other%	**237**	**7%**

The majority of the inventoried active professional facilities in Alberta, as in other zones, have a capacity of under 800 seats, allowing for the presentation of a diversity of small and medium-sized productions, such as children's performances, theatre and some variety.

According to the inventory, larger productions of theatre, chamber music and variety acts have only one ideally-sized facility in the 800-1,200 seat range, which is located in Banff. All three facilities of over 1,200, the capacity most appropriate to presenting products with more demanding technical and spatial requirements, such as ballet, opera and symphonic music, are located in the two most populous markets, Edmonton and Calgary.

In Alberta, *Traditional performing arts* accounted for 75% (1,433) of the 1,914 inventoried opportunities. With 1,236 theatre presentations, Alberta was second only to Ontario (1,272) among the 8 provincial zones. The inventoried contemporary dance performances (63) indicate a relatively strong presence for this performing art.

With the exception of musicals, which offered 147 occasions to attend, the remaining types of popular entertainment were underrepresented in the inventoried distribution network.

Popular performing arts represented 244, or 13% of the available presentations, compared with the nationwide average of 18%. The low inventory recorded for the Popular performing arts in active professional facilities in Alberta, as elsewhere, is not indicative of their availability outside this network, i.e., in the commercial club network.

2.2.2.2 Perceived Product Availability

The vast majority of the general public in Alberta is content with performing arts product availability. Of all the provincial zones, Albertans are the least likely to use non availability as a reason for not attending as often as they would like (28%), and also the least likely to indicate that they would increase their attendance if more performances were available (28%).

However, for Alberta audiences in mid-sized communities, a majority (56%) indicate they would attend more often if more performances were available, with nearly half of respondents residing in rural communities also indicating this.

Audience members in this province believe they have "frequent" or "occasional" accessibility to most of the traditional performing art forms. Popular performing art forms are also seen as relatively accessible, however, the accuracy of this perception is difficult to confirm as it is presumed that product types such as jazz/blues or country and western, again, are often more present in the commercial club network.

2.2.3 PERCEPTION OF FACILITIES

The general public in Alberta is as likely as the average Canadian to indicate that a facility only occasionally influences the decision to attend a performance (36%) and that the type of influence, positive or negative, depends on the facility (66%).

Similarly, the percentage of Albertan audiences indicating that the facility only occasionally influences their decision to attend a performance approximates national figures. Compared with national figures, similar proportions indicate that the effect of the influence, positive or negative, depends on the facility.

The way in which features of a facility influence a decision to attend a performance is rated similarly by Alberta's population and the rest of Canadians, with few significant exceptions. The quality of the house program is the only customer service feature rated as "very" important to the decision to attend a performance by a slightly lower proportion of Albertans than the national average (a difference of 6%). Also, somewhat fewer Albertans than Canadians overall consider the ease of getting to the facility as being "very" important (33% versus 37%).

All facility features are perceived as being of slightly better quality by audiences in Alberta than by Canadian audiences in general. Features perceived to be better related to customer services (washrooms are rated as "excellent" by the highest proportion of audiences of all 11 zones, cleanliness of hall and ease of access to seats are both rated slightly above the national average). As well, compared with national figures, audiences in Alberta are somewhat more likely to report easier parking.

Although no feature is considered as particularly more important to Alberta's general public than to Canadians, Albertan audiences seem more satisfied than the national average when rating the quality of the features of facilities they attended.

2.2.4 ATTENDING MOTIVATIONS AND CONSTRAINTS

Attitudes of Albertans reflect those of the nation overall regarding their reasons for not attending a performance. The top three reasons for non-attendance are price, time, and other obligations. Availability of performances offered to the community does not seem to be a major problem. Scoring among the four lowest zones in Canada, only 38% of Albertans, compared with 49% of Canadians overall, indicate that the lack of performances offered prevents them from attending. Lack of time, however, does appear to be a problem, as 59% of the general public cites this as an important reason not to attend.

Residents of communities with a population of 100,000 and over are more likely than Canadians overall to indicate that the reason for not attending a performance is that prices are too expensive (73%), and other obligations (46%). The availability of performances is less of a constraint in these communities compared with similar sized communities across the country. For Alberta's general public in communities of 10,000 to 100,000 price is less of a constraint, while having other obligations and no one to go with become more important .

Compared with the national average for both mid-sized and larger communities, a significantly lower proportion of audience respondents agree "strongly" that they would attend more often if more performances were offered in their community.

Regarding the various factors considered "very" important in influencing the decisions of the general public to purchase a ticket, the particular piece being presented emerges as the top factor (44%). The price of the ticket is the second highest mentioned (42%), followed, though not closely, by the desire for an evening out (28%). The particular piece being presented scores significantly lower than the Canadian average, while the two others are equal to the Canadian average.

When asked if they prefer to attend a performance presented by a local, a visiting national, or an international company, 56% of the general public in Alberta indicate that it makes no difference. Nationally, 52% of Canadians indicate no preference.

Attitudes of audiences do not appear to differ greatly from the nation overall regarding the importance of other factors influencing the decision to attend, with the exception of the desire for an evening out, which Albertans rate as important seven points higher than the Canadian average.

In rural and small communities, the proportion of audiences who indicate that word of mouth is at least somewhat important is over 70%, somewhat higher than the national average of 62%.

2.2.5 PRICING ISSUES

The amount paid by the general public in Alberta to attend the most recent professional performance is slightly lower than the national average. Table 7 shows that average prices for attendance at such events decrease with the size of the community.

While there is some zonal variation in the average amount that the Albertan general public reports they have paid to attend professional performances in the past, few differences are noted when examining attitudes toward the average amount Albertans would be prepared to pay to attend the types of performances listed in Table 7. The sole exception is the lower average amount the general public is prepared to pay for a folk performance, relative to other performance types.

However, noteworthy differences are present according to community size when residents were asked to assess their interest in paying any amount to attend a number of specific types of performances. In particular, interest in paying to see classical music increases with the size of the community. Conversely, interest in paying to see folk music performances or children's music/theatre increases as community size decreases.

Overall, there is no difference between the amount that members of the audience in Alberta paid to attend their last professional performance and the national average. However, while there is little deviation in the average amount paid to attend the most recent professional performance among those living in the largest and the smallest Alberta centres, residents of mid-sized centres indicate that they have paid significantly less money to attend their most recent professional performance.

This finding continues throughout the results. As Table 7 shows, residents of mid-sized Alberta communities would prefer to pay less for the types of performances assessed than would residents of the largest and smallest communities. Residents of rural Alberta are much less likely to say that they are not interested in paying to attend jazz/blues or classical music than are their more urban counterparts.

Albertans living in urban centres of over 100,000 people are less likely than other Albertans to indicate they would be prepared to pay at least eight dollars more to see a performance. Other variations within the province of Alberta include the fact that a notably lower proportion of those from rural communities, as compared with the two other community sizes, indicate that they would not be willing to pay any more than they paid for their ticket.

Table 7

Alberta: TICKET PRICES PAID & PREPARED TO PAY

	COMMUNITY SIZE					
	100,000 or more		10,000 to 99,999		Under 10,000/rural	
	%		%		%	
	GP	AUD.	GP	AUD.	GP	AUD.
AMOUNT PAID FOR LAST PROFESSIONAL PERFORMANCE ATTENDED						
Dollar average	$22	$26	$19	$16	$18	$23
Gift	15	2	12	4	3	10
AMOUNT NORMALLY PREPARED TO PAY FOR SINGLE TICKET						
Dance:						
Dollar average	$15	$18	$14	$14	$12	$17
Not interested	31	14	18	8	30	21
Theatre:						
Dollar average	$20	$20	$16	$17	$16	$19
Not interested	9	3	9	1	8	2
Classical music:						
Dollar average	$19	$20	$14	$14	$18	$19
Not interested	28	10	30	6	43	4
Jazz/blues:						
Dollar average	$16	$16	$12	$14	$13	$19
Not interested	35	28	33	18	36	6
Folk music:						
Dollar average	$14	$14	$13	$12	$13	$14
Not interested	37	25	30	21	27	21
Pop/rock:						
Dollar average	$22	$20	$17	$17	$20	$17
Not interested	19	29	24	23	22	29
Child music/theatre:						
Dollar average	$10	$11	$9	$10	$11	$9
Not interested	38	37	33	24	30	36
Professional sports:						
Dollar average	$20		$17		$20	
Not interested	16		15		$16	

2.3 Saskatchewan

2.3.1 PSYCHOGRAPHICS, BEHAVIOUR AND INTENTION

Table 1 — Psychographic Segments

VALUES TOWARD THE ARTS

	SASK	NATIONAL AVERAGE
	%	%
Devoted	4	8
Believers	16	17
Practitioners	11	14
Conditionals	21	18
Uncommitted	16	14
Uninvolved	18	17
Carefree Pop/Rockers	5	6
Tuned Out	9	6

Saskatchewan residents are somewhat below average in terms of the proportion of the population in the first three segments — Devoted, Believers and Practitioners (31% versus 39% nationally). They are, on the other hand, above average in the proportion of segments who are less positively oriented to the arts. Thus, 37% of the population, compared with 32% nationally, can be characterized as Conditionals or Uncommitted.

Further, 9% of the population falls into the Tuned Out category. This suggests that orientations toward the arts are generally weaker in Saskatchewan than they are in other parts of the country.

Compared with the national average, residents of Saskatchewan are less likely to report having attended one of the Traditional performing arts in the past six months, and notably more likely to say they have "never attended". However, when we examine behaviour within the province according to community size, we see that attendance by those living in larger communities of over 100,000 reflects that of the nation overall.

The lower provincial average is driven by those in mid-sized communities, and even more so, by those in rural communities where attendance at any of the Traditional performances in the past six months is considerably lower.

Attendance at the Popular performing arts closely resembles the national average. Within the province, again, attendance is higher among those in the larger urban centres.

As indicated in Table 2, those living in either of the two urban centres of Regina and Saskatoon, and who have attended a more Traditional type of performance in the past six months are notably more likely than those in mid-sized or rural communities to express an interest in attending more often. However, the same does not hold for the Popular performances. Among those who have attended a Popular performance in the past six months, interest in attending more often is equally high, irrespective of community size, and reflects the national average.

Table 2

General Public: Saskatchewan

COMMUNITY SIZE VARIATIONS IN ATTENDANCE PATTERNS & INTEREST IN ATTENDING MORE TRADITIONAL & POPULAR PERFORMING ARTS

	100,000 or more %	10,000 to 99,999 %	Under 10,000/rural %	Zone average %
ATTENDANCE/TRADITIONAL PERFORMING ARTS				
Attended last six months	46	33	25	34
Attended last five years	21	18	16	18
Never attended	33	49	58	48
INTEREST IN ATTENDING MORE TRADITIONAL PERFORMING ARTS				
Attended last six months:				
Interested	36	26	22	27
Content	11	7	4	7
Attended last five years:				
Interested	12	9	8	10
Content	9	8	8	9
Never attended:				
Interested	11	11	13	12
Content	22	38	45	
ATTENDANCE/POPULAR PERFORMING ARTS				
Attended last six months	60	54	56	57
Attended last five years	26	22	22	23
Never attended	14	24	22	19
INTEREST IN ATTENDING MORE POPULAR PERFORMING ARTS				
Attended last six months:				
Interested	50	50	47	49
Content	10	4	9	9
Attended last five years:				
Interested	20	17	12	15
Content	6	5	10	8
Never attended:				
Interested	7	16	9	9
Content	7	8	13	10

2.3.2 PRODUCT AVAILABILITY

2.3.2.1 Inventoried Product Availability

Table 3

Pop. (000)	741,1	Inventoried Facilities	19	Inventoried Performances 90/09-91/06	451
% of Total	4	% of Total	5	% of Total	2

The zone of Saskatchewan, with 4% of the Canadian population over 16 years of age, included 2% (451) of the total number of inventoried professional performances. Saskatchewan had 19 inventoried active professional facilities representing 5% of these facilities nationwide.

Between them, Saskatoon and Regina had the most options of any inventoried Saskatchewan community, with 9 facilities and 91% (411) of the performances. The remaining 41 performances took place in 10 facilities in ten different localities.

Smaller community presenters with no access to professional facilities have not been inventoried to any great degree.

4. CAPACITY	
< 400	9
400-800	7
800-1200	1
> 1200	2
Total	19

5.COMMUNITY SIZE	
5,000-10,000	5
10,000-100,000	4
> 100,000	2
Total	11

6. INVENTORIED PERFORMANCES FALL-WINTER-SPRING 1990-91

Type	Performances	% of national
Ballet	12	4%
Contem. dance	4	1%
Dance%	**16**	**2%**
Th. comedy	92	2%
Th. drama	177	4%
Th. av-garde	12	1%
Theatre%	**281**	**3%**
Opera%	6	2%
Symph. music	7	1%
Symph. "pop"	2	1%
Chamber mus.	12	2%
Contem. class.	5	4%
Choral music	4	2%
Classical%	**30**	**2%**
Traditional%	333	3%
Pop/rock	14	2%
Comedy	4	1%
Folk music	8	4%
Musicals	27	2%
Jazz/blues	12	5%
Count.& west.	7	**11%**
Popular%	**72**	**2%**
Child prod.	40	1%
Ethnic/herit.	6	3%
Other%	**46**	**1%**

Most of the inventoried facilities (84%) had under 800 seats, the capacity normally suitable for presenting a variety of small to medium-sized productions.

In Saskatchewan, 3 facilities were inventoried with capacities greater than 800 seats. The two halls in the 1,200 seat range, usually suitable for presenting the performing arts with more specialized requirements, such as opera, ballet and symphonic music, are located in the cities of Regina and Saskatoon, the two markets of over 100,000 capable of sustaining this capacity.

Of the 451 performances available in Saskatchewan, 333 or 74% constitute *Traditional performing arts*, a greater proportion than the 64% exhibited nationally. Theatre performances were the most prevalent at 281, with theatre drama (177), as inventoried, presented almost twice as often as theatre comedy (92). While not conclusive, the inventoried performances for dance (16) and classical music (30) would seem to indicate that opportunities were limited for viewing these types of performing arts.

Popular performing arts accounted for 16% of the inventoried total, with musicals (27) offering the most occasions to view a performance. As with the majority of other zones, most forms of Popular entertainment are assumed to occur primarily outside the inventoried network.

The low frequency of inventoried children's shows should not be taken as a reliable indicator of availability, as this product is often presented in nonprofessional facilities or in schools, which were not part of the survey.

2.3.2. 2 Perceived Product Availability

Over 50% of Saskatchewan's general public who indicate an interest in attending performances more frequently identify the lack of performances in their communities as an important reason for not attending more often. An above average number (46%) also agree they would attend more performances if there was increased availability in their community. Those outside the major centres express the greater lack of opportunity. It is interesting to note, however, that in rural Saskatchewan only half of the respondents who cite "few performances in your community" as a reason for non-attendance agree "strongly" that greater availability would increase their attendance.

In the traditional performing arts, a slightly higher percentage of the audiences believe that performances of ballet and choral music occur "frequently" or "occasionally," while a significant number believe avant-garde theatre and opera are rarely available. To the extent of this survey's inventory, the data would appear to substantiate the Saskatchewan audience's perception of limited avant-garde theatre and opera availability.

Except for jazz/blues and comedy performances, Saskatchewan audiences believe that the Popular performing arts are equally or more accessible compared with the average nationwide. For country and western, in keeping with the Prairie Provinces' perceptions of high frequency for this performance type, almost three quarters of respondents cite "frequent" or "occasional" availability. Since many performances in the Popular performing arts likely utilize venues outside the surveyed distribution network, the actual rate of accessibility cannot be confirmed.

2.3.3 PERCEPTION OF FACILITIES

The population of Saskatchewan is more likely to be only occasionally influenced by the facility when deciding to attend a performance, compared with the population of Canada in general (5% higher than national average). Actually, Saskatchewan has the highest proportion of the population (20%) that indicate never being influenced by the facility. For the rest of Canadians, the type of influence, positive or negative, depends on each particular facility attended.

The specific features of facilities influence the residents of Saskatchewan in much same way they influence Canadians, except for the view of the stage. In this instance, view of the stage is more important for residents of Saskatchewan than for the average Canadian.

The role of the facility in the decision-making process to attend for the population of Saskatchewan is also similar to that of Canadians in general, though audiences of this province perceive some important features of the facilities they visited as being less favourable. The comfort of seating was rated "excellent" by significantly more (12 %) audience members than the national average.

Facility managers should note, however, that two customer service features, the quality of the house program and the ease of access to seats, already rated low by the majority of audiences across Canada, are rated as "excellent" by 6% and 5% fewer audience members than national averages.

It is also worth noting that audiences in Saskatchewan seem to have a harder time than the average, first in getting to the facility, and once there, finding a parking space. Both features involving access to the facility, which is the second most important group of features nationwide, are rated lower than average.

2.3.4 Attending Motivations and Constraints

The general public of Saskatchewan is no exception in admitting that its main reason for not attending performances is linked to the price of the tickets. However, while the national average is 49%, as many as 59% of Saskatchewan residents indicate that a reason for non-attendance is that there are too few performances in their community. Among those who wish to attend more performances, 51% (versus 35% nationally) cite few performances as a constraint.

In larger communities (100,000 and over), 70% of respondents indicate that the primary reason for not attending performances is that the price of tickets is too expensive. Only 5% of respondents agree "strongly" that they would attend more if there were more opportunities (the Canadian average is 12%). In smaller communities (10,000 to 99,999), few performances in the community (71%), too expensive tickets (58%), no place in the community for performances (24%) and too long to get there (23 %) are mentioned as reasons for non-attendance, each of which is significantly higher than the national average.

In the rural communities (10,000 people and less), the only outstanding reason for not attending is not liking to be out late (20%, the national average being 11%). Compared with the Canadian average of 40%, only 30% of rural Saskatchewan residents strongly agree that they would attend more if there were more opportunities in their community.

Reflecting the general public response, 47% of Saskatchewan audiences strongly and somewhat agree that they would attend more if there were more performances offered in their community, 10 points higher than the national average. It is worth noting that only 3 zones achieve stronger or comparable results in response to this question, namely the Atlantic zone(64%), New Brunswick (61%) and British Columbia outside Vancouver (48%).

Accessibility is also a very significant constraint to attendance among Saskatchewan audiences. As many as 50%, the highest results in Canada, agree that "it's difficult to get there."

Regarding factors influencing the decision to attend a performance, the company or the group of performers is an important factor for 34% of Saskatchewan residents, the highest score in the country, and is followed by the reputation of quality related to the product (33% compared with the national average at 22%). The particular piece being performed appears less important and scores below the Canadian average (22% versus 39%).

When asked if they would prefer a local performing company or a visiting national or international visiting company, residents of Saskatchewan show a slight tendency to favour a local and a national company, though a surprising 15% of the Saskatchewan general public say they do not know, the highest such result in Canada.

For all community sizes, the company or group of performers is considered a very important factor in the decision to attend a performance. With respect to audiences, 37% of attenders say the reputation of the performing group is a "very" important decision factor (the highest score for Canada). Only 42% (the second lowest result in Canada) indicate that the piece being presented is a "very" important element, compared with 53% nationally.

2.3.5 Pricing Issues

The provincial average for the Saskatchewan general public with reference to the amount paid for the last professional performance attended is less than the national average ($18 versus $23). As indicated in Table 7, there is very little variation within the province, according to community size.

Not only is there very little difference within the province in terms of amount paid for the last performance attended, but there is also very little variation in attitudes toward the average amount the Saskatchewan general public would pay for a single ticket to any of the types of performances surveyed.

When some variation in the data according to community size does occur, it is in the proportions indicating they would not be interested in paying any amount to attend that type of performance. For example, residents of the two urban centres are more likely than those in mid-sized communities, and even more so than residents of rural communities, to say they would not be interested in folk music and, though to a lesser extent, professional sports. In addition, compared with those in mid-sized communities, residents of the urban centres and rural communities are more likely to say they would not be interested in paying for children's performances.

Table 7 also summarizes findings from the audience survey gathered from the two urban centres and rural Saskatchewan. The average ticket price respondents from the urban centres paid for their performance varies somewhat from the national average. In particular, Saskatchewan audiences are below the national average in the amount they are prepared to pay for performances of theatre and classical music. On the other hand, they are above the national average in terms of the amount they are prepared to pay for folk and jazz/blues performances.

The average dollar amount residents are prepared to pay for the performances listed in Table 7 does not differ notably from national averages.

Further, residents of rural Saskatchewan are much less likely than their urban counterparts to say they are not interested in any of classical music, jazz/blues, folk music or pop/rock. The desire to see performances may be a result of limited availability of performances from which to choose. However, while they are less likely to say they are not interested, the average amount they would be willing to pay is not any greater.

In terms of their willingness to pay more for a performance, responses from residents of the two urban centres of Saskatchewan reflect those in similar community sizes across the country. However, compared with the national average, a higher proportion indicate that they would not be willing to pay any higher amount to attend the performance.

Table 7

Saskatchewan: TICKET PRICES PAID & PREPARED TO PAY

	COMMUNITY SIZE					
	100,000 or more		10,000 to 99,999		Under 10,000/rural	
	%		%		%	
	GP	AUD.	GP	AUD.*	GP	AUD.
AMOUNT PAID FOR LAST PROFESSIONAL PERFORMANCE ATTENDED						
Dollar average	$18	$23	$17	n/a	$17	*
Gift	10	2	0	n/a	5	*
AMOUNT NORMALLY PREPARED TO PAY FOR SINGLE TICKET						
Dance:						
Dollar average	$14	$17	$11	n/a	$12	$12
Not interested	28	14	24	n/a	24	10
Theatre:						
Dollar average	$16	$17	$16	n/a	$13	$14
Not interested	15	4	19	n/a	19	3
Classical music:						
Dollar average	$15	$18	$15	n/a	$14	$14
Not interested	41	10	37	n/a	38	4
Jazz/blues:						
Dollar average	$8	$14	$9	n/a	$6	$12
Not interested	40	35	41	n/a	46	15
Folk music:						
Dollar average	$12	$12	$12	n/a	$12	$12
Not interested	41	29	32	n/a	24	8
Pop/rock:						
Dollar average	$20	$17	$16	n/a	$17	$12
Not interested	25	40	27	n/a	31	33
Child music/theatre:						
Dollar average	$8	$9	$9	n/a	$9	$8
Not interested	44	41	29	n/a	40	28
Professional sports:						
Dollar average	$18		$16		$16	
Not interested	24		17		14	

* Note: The sample of audience in communities of under 10,000 people is too small to report findings.

2.4 Manitoba, including the Northwest Territories

2.4.1 PSYCHOGRAPHICS, BEHAVIOUR AND INTENTION

Table 1 — Psychographic Segments

VALUES TOWARD THE ARTS

	MAN.	NATIONAL AVERAGE
	%	%
Devoted	9	8
Believers	14	17
Practitioners	15	14
Conditionals	15	18
Uncommitted	19	14
Uninvolved	14	17
Carefree Pop/Rockers	6	6
Tuned Out	9	6

The proportions of the psychographic segments among the general public in Manitoba quite closely resemble the national figures. However, a slightly higher than average proportion of the population can be defined as Uncommitted or as Tuned Out. In other words, Manitoba has more residents who tend toward neutral or negative views towards the arts, than tend toward a positive orientation, compared with the national average.

When ethnic background is considered, among the general public, those of French/French Canadian origin are as likely as the population overall to report that they attended a Traditional performing arts event (41% versus 40%). They are somewhat more likely, than the population overall to report attending a Popular type of performance (61% versus 54%).

Attendance patterns within Manitoba differ from national patterns more noticeably for the Traditional arts than for the Popular arts. For those in urban centres of over 100,000 people, attendance at Traditional performances in the past six months, reflects the national average. However, attendance patterns in the last six months for those in smaller communities, particularly those in mid-sized communities of 10,000 to 100,000 people, are significantly below the national average. In fact, those residing in mid-sized communities are most likely to say they have never attended one of the Traditional performing arts.

Attendance patterns for the Popular performing arts differ somewhat within the zone. As indicated Table 2, residents of rural communities are least likely to say they have attended a performance in the past six months. Residents of larger urban centres are less likely to report having never attended a performance.

Among those who have attended at least one of the Traditional performing arts in the past six months, interest in attending more performances is notably higher among residents in the larger urban centres, followed by residents of rural communities, and is lowest among those in mid-sized communities.

With respect to the Popular performing arts, among those who have attended a performance in the past six months interest in attending more is lower in rural communities compared with larger communities. Those in mid-sized communities are slightly more likely than residents of urban centres to say they would be interested in attending more, though this difference is not great.

Table 2

General Public: Manitoba

COMMUNITY SIZE VARIATIONS IN ATTENDANCE PATTERNS & INTEREST IN ATTENDING MORE TRADITIONAL & POPULAR PERFORMING ARTS

	100,000 or more	10,000 to 99,999	Under 10,000/rural	Zone average
	%	%	%	%
ATTENDANCE/TRADITIONAL PERFORMING ARTS				
Attended last six months	45	29	35	41
Attended last five years	23	17	18	19
Never attended	31	55	47	40
INTEREST IN ATTENDING MORE TRADITIONAL PERFORMING ARTS				
Attended last six months:				
Interested	36	21	28	32
Content	10	7	7	9
Attended last five years:				
Interested	15	14	9	13
Content	8	2	3	6
Never attended:				
Interested	11	19	18	14
Content	20	36	35	26
ATTENDANCE/POPULAR PERFORMING ARTS				
Attended last six months	57	60	46	53
Attended last five years	24	12	25	24
Never attended	19	29	29	23
INTEREST IN ATTENDING MORE POPULAR PERFORMING ARTS				
Attended last six months:				
Interested	50	55	40	47
Content	7	5	6	7
Attended last five years:				
Interested	17	12	15	16
Content	7	0	9	7
Never attended:				
Interested	8	10	12	10
Content	10	19	16	13

2.4.2 PRODUCT AVAILABILITY

2.4.2.1 Inventoried Product Availability

Table 3

Pop. (000)	874,1	Inventoried Facilities	16	Inventoried Performances 90/09-91/06	899
% of Total	4	% of Total	5	% of Total	5

While Manitoba and the Northwest Territories comprise 4% of the Canadian population over 16 years of age, their proportion of the 18,955 total inventoried professional performances nationwide is somewhat higher at 5%.

The ratio of 5% of inventoried active professional facilities appears to be consistent with Manitoba's percentage of the total performances inventoried nationwide. However, 10 of the 16 inventoried active professional halls were situated in Winnipeg and accounted for 815 of the 899 viewing opportunities. Small community presenters with no access to professional facilities were not inventoried.

4. CAPACITY	
< 400	11
400-800	1
800-1200	2
> 1200	2
Total	16

5. COMMUNITY SIZE	
5,000-10,000	13
10,000-100,000	3
> 100,000	1
Total	17

6. INVENTORIED PERFORMANCES FALL-WINTER-SPRING 1990-91

Type	Performances	% of national
Ballet	28	10%
Contem. dance	29	7%
Dance%	**57**	8%
Th. comedy	110	3%
Th. drama	339	8%
Th. av-garde	0	0%
Theatre%	**449**	5%
Opera%	**10**	2%
Symph. music	40	8%
Symph. "pop"	21	14%
Chamber mus.	32	6%
Contem. class	0	0%
Choral music	4	2%
Classical%	**97**	6%
Traditional%	**613**	5%
Pop/rock	5	1%
Comedy	4	1%
Folk music	23	11%
Musicals	0	0%
Jazz/blues	6	2%
Count.& west.	2	3%
Popular%	**40**	1%
Child prod.	239	8%
Ethnic/herit.	7	4%
Other%	**246**	7%

In keeping with the proportion found in other zones, most of this province's inventoried professional facilities were under 800 seats. In Manitoba, however, all facilities except one in the surveyed network were under 400 seats.

There were two facilities inventoried which, from the standpoint of capacity, could possibly present the larger, technically more demanding types of products such as ballet and opera. These facilities in the 1,200 seats and over range are both located in Winnipeg, the only market in Manitoba over 100,000, which is the population normally associated with economically sustaining this capacity.

The percentage of *Traditional performing arts* out of the total inventoried performances in Manitoba is 68% (613 out of 899), slightly above the national proportion (64%). The inventory indicates that opportunities to view dance performances were equally distributed between ballet and contemporary dance.

In the classical music category, while the total number of performances was not remarkable, the higher than average proportion (only as it relates to proportions indicated by this survey's inventory) of symphonic "pops" concerts to symphonic music concerts (21/40) is somewhat unusual.

The inventory, though not conclusive, seems to indicate that individuals with a preference for contemporary classical music were not especially favoured in active professional facilities in Manitoba during the surveyed season, and that choral performances offered little opportunity for attending as well.

The *Popular performing arts* were not present to any great degree in the surveyed distribution network, however, folk music stood out with 23 perform-

ances. Although there were no musical performances inventoried, this should not be taken as a literal account of availability, but rather as an indication of the limited availability of this performance type in professional facilities.

Children appear to have been well accommodated, with 239 opportunities to view a live performance.

2. 4.2.2 Perceived Product Availability

Manitobans perceive, in equal or greater numbers than Canadians overall, that most Traditional performing arts are "frequently" or "occasionally" available in their province. Theatre comedy and theatre drama, ballet, contemporary dance and symphonic music are cited as the most accessible, with avant-garde theatre and opera, the least accessible.

The Popular performing arts are believed by audiences to be consistently available. As with the other Prairie Provinces, Manitobans perceive folk and country and western to be more frequently available than is perceived in other parts of Canada.

Consistent with the overall perception of at least the occasional availability of most performing arts products, two thirds of the general public in Manitoba believe they are adequately served by the availability in their province.

In Manitoba's medium-sized communities, however, 72% of the audiences strongly or somewhat agree that they would increase their attendance if more performances were available (54% nationally for this community size), which suggests, if not a lack of availability, a perception of same.

2.4.3 PERCEPTION OF FACILITIES

Compared with other zones, the facilities in Manitoba do not appear to influence the general public's decision to attend a performance to any great extent, with only 13%, the lowest proportion in the country, citing this as a factor. This figure rises to 19% for Manitoban audiences, who also seem to have made a sharper evaluation of their facilities than the general public, as 9% fewer responded that facilities can have a positive or a negative effect on their decision to attend a performance.

The features of a facility influence the Manitoba general public's decision to attend a performance similar to the nation overall, with the quality of the facility (sound, seating comfort, view of the stage) ranking first, followed by the ease of getting to the facility and customer services. There are two variations. First, proportionately fewer Manitobans than elsewhere in Canada consider the quality of a customer service feature, the house program, a "very" important factor (19% versus 28%), and second, the ease of parking at the facility is slightly more likely to be rated as "very" important (5% higher the national average).

Manitoban audiences, when asked to rate the quality of the facility they were in at the time of the survey, rate the quality of the sound and the view from seats (the two most important attributes of a facility according to the Canadian general public) as "excellent"

in slightly higher proportions than the national average (respectively 7% and 5% higher).

2.4.4 Attending Motivations and Constraints

Evaluations by the Manitoban general public of factors influencing their decision to attend a performance reflect, in the main, those of other Canadians, with a few minor variations. Word of mouth, the desire for an evening out and the price of tickets are considered slightly more important, while the particular piece being performed seems to be somewhat less important to Manitobans than for the general public elsewhere. Similar to the nation overall, the residents of this zone favour local and national performers, however, they are less likely to favour international companies.

Important decision-making factors for audience repondents in Manitoba are the desire for an evening out, rated 7% higher than the national average (58% versus 51%) and reviews in the media, 6% above the average (54% versus 48%). The data indicate that for Manitoban audiences, the company or the group of performers and company's reputation have less of an effect on the decision-making process than for audiences elsewhere in the country.

Interestingly, while the general public of this zone rate the ticket price as an important decision-making factor 7% higher than nationally (53% versus 46%), they are also slightly less likely to say that ticket prices are too high. As a constraint, Manitobans overall were less likely to say lack of performances is a reason for non-attendance (42% versus 49% nationally), however, as was noted in section 2.4.2.2 for this zone, it appears to be a much greater constraint for Manitoba's audiences in medium-sized communities.

2.4.5 Pricing Issues

The Manitoban general public are somewhat below the national average in the amount they paid for a ticket to the last performance they attended ($19 versus $23). Audiences, on the other hand, paid a little above average ($24 versus $22). The average dollar amount paid for the last performance attended by both audiences and the general public varies quite notably within the province. As indicated in the Table 7, residents of mid-sized communities reportedly paid a higher dollar amount for their ticket than those in urban centres and nearly twice as much as those in rural communities. Audiences paid more if they lived in mid-sized communities.

Although variations in the average dollar amount the Manitoba general public would pay for a single ticket to any of the performances listed are not that great, there is considerable variation in the proportion by residents across the three community sizes that indicate they would not be interested in paying any amount to attend that type of performance.

For example, residents of mid-sized communities are somewhat more likely than residents of larger and smaller communities to say they would not be interested in attending a theatre performance, while they are comparatively less likely to make that assertion regarding dance, classical music, jazz/blues, folk or pop/rock performances.

Variations among audiences between those residing in communities of over 100,000 and those living in mid-sized communities of 10,000 to 100,000, in terms of the average amount they would be willing to pay for single ticket to a performance, are not great. However, those living in larger communities are more likely than those in the mid-sized communities to say they are not interested in jazz/blues, folk music, dance or classical music.

Reflecting findings from other provinces, nearly half of Manitobans living in a larger urban centre of over 100,000 people say they would be willing to pay $2-$4 more for their ticket to the performance they attended.

Table 7

Manitoba:
TICKET PRICES PAID & PREPARED TO PAY

	COMMUNITY SIZE					
	100,000 or more		10,000 to 99,999		Under 10,000/rural	
	%		%		%	
	GP	AUD.	GP	AUD.	GP	AUD.
AMOUNT PAID FOR LAST PROFESSIONAL PERFORMANCE ATTENDED						
Dollar average	$20	$26	$27	$21	$15	
Gift	7	3	7	1	0	
AMOUNT NORMALLY PREPARED TO PAY FOR SINGLE TICKET						
Dance:						
Dollar average	$14	$19	$16	$17	$12	*
Not interested	32	17	19	9	30	*
Theatre:						
Dollar average	$16	$21	$18	$19	$14	*
Not interested	12	3	19	4	12	*
Classical music:						
Dollar average	$17	$19	$14	$19	$14	*
Not interested	32	15	24	4	37	*
Jazz/blues:						
Dollar average	$14	$16	$12	$17	$14	*
Not interested	33	26	29	17	42	*
Folk music:						
Dollar average	$12	$14	$13	$15	$14	*
Not interested	33	24	14	17	28	*
Pop/rock:						
Dollar average	$19	$20	$24	$18	$20	*
Not interested	21	30	5	28	21	*
Child music/theatre:						
Dollar average	$9	$11	$10	$12	$9	*
Not interested	33	38	33	32	6	*
Professional sports:						
Dollar average	$17		$18		$17	
Not interested	20		24		28	

* Note: The sample of audience in communities of under 10,000 people is too small to report findings.

2.5 Ontario outside Toronto

2.5.1 PSYCHOGRAPHICS, BEHAVIOUR AND INTENTION

Table 1 — Psychographic Segments
VALUES TOWARD THE ARTS

	ONT.	NATIONAL AVERAGE
	%	%
Devoted	5	8
Believers	18	17
Practitioners	14	14
Conditionals	18	18
Uncommitted	14	14
Uninvolved	16	17
Carefree Pop/Rockers	8	6
Tuned Out	7	6

Analysis of Ontario residents, outside of Toronto, indicates similar proportions of psychographic segments compared to the national averages, though with slightly fewer in the Devoted segment.

Those among the general public who identify themselves as being of French/French Canadian background are somewhat more likely than the population overall to report attendance at performances. Thus, while 41% of the population overall indicated that they had attended a Traditional arts performance in the last six months, 48% of those with French/French Canadian background reported attendance. In the case of attendance at Popular arts performances, no such difference exists, nor is there a difference in arts purchasing behaviour.

Among those living in urban centres in Ontario, outside of Toronto, attendance at one of the Traditional performing arts over the last six months mirrors the national average. Those in mid-sized communities, and rural communities are less likely to have attended in the past six months.

Interestingly, those in mid-sized communities are notably more likely to say they have attended in the past five years, though not in the past six months. Not only are those living in rural Ontario less likely to indicate that they have attended one of the Traditional performing arts in the past six months, but they are also more likely to say they have in fact "never attended" the Traditional performing arts.

Similarly, attendance at a Popular performing arts production in the past six months is highest among those living in communities of over 100,000. Those living in rural Ontario are most likely to say they have "never attended" one of the Popular performing arts.

For both the Traditional and Popular performing arts, interest in attending more often is highest among those in urban centres of over 100,000 people, and among those who have already attended at least once in the past six months. In both instances, these figures reflect the national average.

Table 2

General Public: Ontario Outside Toronto
COMMUNITY SIZE VARIATIONS IN ATTENDANCE PATTERNS & INTEREST IN ATTENDING MORE TRADITIONAL & POPULAR PERFORMING ARTS

	100,000 or more %	10,000 to 99,999 %	Under 10,000/rural %	Zone average %
ATTENDANCE/TRADITIONAL PERFORMING ARTS				
Attended last six months	46	38	34	41
Attended last five years	20	29	18	22
Never attended	33	33	47	37
INTEREST IN ATTENDING MORE TRADITIONAL PERFORMING ARTS				
Attended last six months:				
Interested	35	29	27	31
Content	11	10	7	9
Attended last five years:				
Interested	16	21	12	17
Content	4	5	6	5
Never attended:				
Interested	11	10	16	12
Content	22	26	31	25
ATTENDANCE/POPULAR PERFORMING ARTS				
Attended last six months	59	44	47	52
Attended last five years	23	37	26	28
Never attended	16	19	27	19
INTEREST IN ATTENDING MORE POPULAR PERFORMING ARTS				
Attended last six months:				
Interested	50	37	44	46
Content	9	7	3	6
Attended last five years:				
Interested	20	30	18	22
Content	5	8	7	6
Never attended:				
Interested	8	10	12	10
Content	8	9	15	10

2.5.2 PRODUCT AVAILABILITY

2.5.2.1 Inventoried Product Availability

Table 3

Pop. (000) 5,461,5	Inventoried Facilities 54	Inventoried Performances 90/09-91/06 2,840
% of Total 26	% of Total 16	% of Total 15

Ontario, with 26% of the Canadian population over 16 years of age, offered the highest number of opportunities to view a performing arts product of all 8 provincial zones. This zone's 2,840 inventoried professional performances during the season comprised 15% of the total inventoried across Canada. These performances were distributed through the 54 inventoried active professional facilities in 29 communities throughout the province.

However, Ontario, outside of Toronto, appears to have two distinct consumer segments, namely those with excellent accessibility and variety, and then the rest. In all, 53% of performances occurred in three centres – Ottawa, with 7 facilities and 926 performances, followed by Niagara-On-the-Lake and Stratford with 6 facilities and 600 occasions to attend between them (mostly at the Shaw and Stratford Festivals). The remaining 47% or 1,314 performances were presented in 41 facilities serving 26 communities. Small community presenters with no access to professional facilities have not been inventoried.

4. CAPACITY	
< 400	18
400-800	19
800-1200	8
> 1200	9
Total	54

5. COMMUNITY SIZE	
5,000-10,000	92
10,000-100,000	24
> 100,000	8
Total	124

6. INVENTORIED PERFORMANCES FALL-WINTER-SPRING 1990-91

Type	Performances	% of national
Ballet	47	17%
Contem. dance	67	16%
Dance%	**114**	**16%**
Th. comedy	585	14%
Th. drama	518	12%
Th. av-garde	169	14%
Theatre%	**1,272**	**13%**
Opera%	**30**	**11%**
Symph. music	106	20%
Symph. "pop"	58	38%
Chamber mus.	46	8%
Contem. class.	4	3%
Choral music	58	34%
Classical%	**272**	**18%**
Traditional%	**1,688**	**14%**
Pop/rock	48	8%
Comedy	30	5%
Folk music	23	11%
Musicals	251	15%
Jazz/blues	35	14%
Count.& west.	15	22%
Popular%	**402**	**12%**
Child prod.	733	24%
Ethnic/herit.	17	9%
Other%	**750**	**23%**

As with most zones, almost 70% of the inventoried facilities had a capacity of under 800 seats, a size normally suitable for small and medium-sized productions. The number of halls between 800-1,200 seats (the capacity usually adaptable to a range of performing art products including touring productions of theatre and variety performances) was similar to that of Québec.

There were 9 larger facilities which, in terms of capacity, could be suitable for presenting the technically and spatially more demanding productions like ballet, opera and symphonic music. Except for the Festival Theatre in Stratford, the inventoried facilities were all located in markets of 100,000 or more, where this capacity is economically feasible to maintain.

With few exceptions, it would seem that most types of performing arts were offered in above average frequencies, with 1,688 recorded opportunities of viewing one of the *Traditional performing arts.*

To the extent of this survey's inventory, the opportunities to attend a theatre presentation in Ontario though numerous at 1,272 were just slightly more than the 1,236 offered in Alberta, a zone serving considerably fewer markets.

This inventory does not include Ontario's numerous small community presenters using nonprofessional facilities, which may account for the previously observed contrast between the apparent product availability in the three best served markets and the rest of the province, even more pronounced when theatre presentations were closely examined.

Of the 1,272 inventoried opportunities to view a performance of theatre, 975 occurred in Ottawa, Stratford and Niagara-On-the Lake.

Of the total 114 recorded dance performances, the opportunities for viewing a performance of ballet were second only to the inventoried availability in Toronto, although the great majority of these were presented in the Ottawa region. In the classical music category, the number of inventoried presentations of symphonic music, symphonic "pops" concerts, and choral music indicated a reasonably strong presence, however, contemporary classical music, according to this survey's inventory of professional facilities, appeared to be limited.

Following the national trend, *Popular performing arts* were not present to any great degree in the inventoried facilities, with the exception of musicals, which offered 251 reasonably distributed opportunities. As well, the frequency of children's productions inventoried in Ontario was the highest of any zone.

2.5.2.2 Perceived Product Availability

A large portion of the Ontario public feel performing arts performances are inadequately available in their communities. Of those expressing an interest in increased attendance, 42% indicate that their reason for non-attendance is "few performances in community." For both the general public and audience members of different-sized communities, there is little variation from national averages, as most respondents in larger centres express a greater perceived product availability, with a proportionate decrease in smaller and rural communities.

Overall, theatre is generally perceived to be frequently or generally available and the perceived frequency of most types of classical music fall within range of the national average as well. Ballet, contemporary dance, avant-garde theatre and particularly opera, are seen as occurring with significantly less frequency than the national average.

Except for musicals and comedy, the Popular performing art forms are perceived as somewhat, though not greatly, available.

2.5.3 PERCEPTION OF FACILITIES

Ontario residents are influenced as often by the facility in their decision to attend a performance as the average Canadian. The same is true for the type of influence the facility exerts, although a slightly greater majority say the influence is both positive and negative.

The frequency of the facility's influence on Ontario audiences resembles that of Canada. More audiences in Ontario, however, than elsewhere in the country say that this influence is positive.

More of Ontario's general public than Canadians overall, tend to consider nearly all facility features as "very" important factors in their decision to attend a performance. Two features relating to the quality of the facility, however, are rated 5% above national levels, namely seating comfort and the view of the stage. In fact, this last feature, already

rated as the most important of all features on the national level, is rated highest of all in Ontario.

Customer service features are slightly more valued by the general public of Ontario than by Canadians overall, however, the quality of the house program which ranked 8% under the national average, appears to be less of a concern.

Similar to Québec, higher percentages of Ontario audiences rated the features of the facilities they attended as "excellent." The quality of sound, the lobby and ease of access to seats all were given a 5% higher rating than nationally by Ontario audiences. The ease of access to the facility, an important consideration for 42% of the general public in this zone, was also given a higher than average assessment.

2.5.4 Attending Motivations and Constraints

For the general public in Ontario, few performances, less interest in the Traditional performing arts and particularly the difficulty in accessing the facility, emerge as important reasons for non-attendance, all of which were rated higher than national averages.

The reasons given for not attending more performances, by the general public in Ontario who are interested in attending more often, reflect those of Canadians, with the exceptions of the lack of product availability and insufficient information. A significant minority of Ontarians (42%) say there are too few performances offered in their community, compared with 35% in Canada. Further, 21% of Ontarians, compared with 16% of Canadians overall, cite the difficultly in finding information about the performances, the highest response in Canada to this constraint. Slightly fewer respondents, compared with the national average, report other obligations as a barrier to increased attendance.

With respect to their preference for local, national or international performers or companies, Ontario's general public do not differ significantly from Canadians overall.

For audiences in this zone, the factors which influence the decision to attend do exhibit some variations from the norm. There is a marked preference for visiting national companies, stronger only in Québec and New Brunswick. Furthermore, the reputation of the performing company and the specific facility are held to be more important for Ontario audiences than elsewhere in the country. Word of mouth, on the other hand, is less important (60% versus 68% nationally).

2.5.5 Pricing Issues

The average dollar amount the Ontario general public paid for the last professional performance they attended indicates that they paid more on average for a ticket than other Canadians ($26 versus $23). Further, among the public, those in smaller communities are likely to report paying higher amounts than others in the province. When the amount the public are prepared to pay is considered, it is invariably well above the national average for each type of product. In fact, Ontarians are typically prepared to pay more than any other zone outside of the three major cities.

Noteworthy differences in the proportion mentioning "not interested" enough to pay any amount, include urban residents being more likely to say they are not interested in

children's theatre/music, and rural residents being more likely to indicate they are not interested in classical music.

Among the audience sample, the average dollar amount paid for the performance attended is at the national average. However, when city size variations are considered, audiences report paying a somewhat higher amount among mid-sized and rural communities, compared with larger urban centres of over 100,000.

Like the public, audiences are prepared to pay more for a ticket to a specific performance than virtually any other zone. In terms of the amount respondents are prepared to pay for a single ticket to one of the performances listed in Table 7, variation across the community sizes emerges in the category of pop/rock concerts. In this instance, those living in larger urban centres are more likely to say they would not be interested in attending, and in fact, are more likely to indicate that they would pay much less. Residents of rural Ontario are least likely to say they would not be interested in attending a pop/rock concert, and indicate that they would be prepared to pay much larger amounts for a single ticket.

Like audiences in other zones, a large majority (74%) of Ontarian audiences are prepared to pay at least $2 more, while 46% report being prepared to pay at least $4 more.

Table 7

Ontario Outside of Toronto: TICKET PRICES PAID & PREPARED TO PAY

	COMMUNITY SIZE					
	100,000 or more		10,000 to 99,999		Under 10,000/rural	
	%		%		%	
	GP	AUD.	GP	AUD.	GP	AUD.
AMOUNT PAID FOR LAST PROFESSIONAL PERFORMANCE ATTENDED						
Dollar average	$24	$16	$26	26$	$27	$24
Gift	14	3	9	2	6	1
AMOUNT NORMALLY PREPARED TO PAY FOR SINGLE TICKET						
Dance:						
Dollar average	$21	$20	$19	$24	$19	$23
Not interested	32	14	34	15	33	17
Theatre:						
Dollar average	$23	$21	$21	$28	$27	$27
Not interested	13	3	12	4	10	2
Classical music:						
Dollar average	$21	$21	$19	$23	$19	$23
Not interested	33	5	21	15	40	6
Jazz/blues:						
Dollar average	$17	$17	$18	$19	$16	$19
Not interested	38	36	39	31	40	29
Folk music:						
Dollar average	$15	$15	$16	$18	$16	$15
Not interested	41	36	36	28	36	26
Pop/rock:						
Dollar average	$27	$18	$25	$24	$28	$24
Not interested	25	44	26	25	24	43
Child music/theatre:						
Dollar average	$9	$13	$13	$14	$11	$11
Not interested	45	47	34	37	33	42
Professional sports:						
Dollar average	$19		$20		$21	
Not interested	22		28		21	

2.6 Québec outside Montréal

2.6.1 PSYCHOGRAPHICS, BEHAVIOUR AND INTENTION

Table 1 — Psychographic Segments

VALUES TOWARD THE ARTS

	QUÉ.	TOTAL
	%	%
Devoted	8	8
Believers	10	17
Practitioners	12	14
Conditionals	23	18
Uncommitted	9	14
Uninvolved	28	17
Carefree Pop/Rockers	7	6
Tuned Out	4	6

The Québec population, outside Montréal, has one of the lowest proportions of Devoted, Believers and Practitioners of any zone unlike Montréal, which contains an above average proportion of the first three segments (making up most performing arts attenders) because of a large proportion of the Devoted segment. Only New Brunswick has a lower proportion in the first three segments. Compared with a national proportion of 39% of the population falling into the first three segments, only 30% do so in Québec outside of Montréal. Québec is mainly lacking in Believers, that is, those with a somewhat romanticized view of the arts and strong attendance.

Québec, like Montréal, has an abundance of Conditionals (23%), but also a large proportion of Uninvolved (28%).

The Uninvolved, as noted previously, tend to be younger and oriented more toward Popular, rather than Traditional, performing arts.

Compared with the national average, residents of Québec outside Montréal are slightly more likely to have attended one of the Traditional performing arts in the last six months. Most of this activity is centred in the largest and the smallest communities, with those living in mid-sized towns and cities of 10,000 to 100,000 people reporting a lower frequency of recent attendance.

Attendance at Popular performing arts events closely matches the national average and is at comparable levels among all community sizes in Québec, outside Montréal.

As indicated in Table 2, those living in the largest communities who have attended a Traditional arts performance in the last six months, are more likely to express an interest in attending more of the same than are those living in rural communities, and much more interested than those living in mid-sized communities. For Popular performances the relationship is similar, as those living in mid-sized communities and who have seen a Popular performance in the last six months are less interested in attending again.

Table 2

General Public: Québec Outside of Montréal
COMMUNITY SIZE VARIATIONS IN ATTENDANCE PATTERNS & INTEREST IN ATTENDING MORE TRADITIONAL & POPULAR PERFORMING ARTS

	100,000 or more %	10,000 to 99,999 %	Under 10,000/rural %	Zone average %
ATTENDANCE/TRADITIONAL PERFORMING ARTS				
Attended last six months	57	38	54	51
Attended last five years	21	28	20	22
Never attended	21	33	26	26
INTEREST IN ATTENDING MORE TRADITIONAL PERFORMING ARTS				
Attended last six months:				
Interested	49	27	43	41
Content	8	11	10	10
Attended last five years:				
Interested	16	21	11	15
Content	5	7	8	7
Never attended:				
Interested	8	11	9	9
Content	13	23	17	17
ATTENDANCE/POPULAR PERFORMING ARTS				
Attended last six months	58	56	58	55
Attended last five years	23	23	20	22
Never attended	18	32	23	23
INTEREST IN ATTENDING MORE POPULAR PERFORMING ARTS				
Attended last six months:				
Interested	51	38	48	47
Content	7	7	9	8
Attended last five years:				
Interested	20	30	15	18
Content	3	8	5	3
Never attended:				
Interested	8	10	9	10
Content	10	9	13	13

2.6.2 PRODUCT AVAILABILITY

2.6.2.1 Inventoried Product Availability

Table 3

Pop. (000)	3,840,3	Inventoried Facilities	62	Inventoried Performances 90/09-91/06	1,920
% of Total	18	% of Total	18	% of Total	10

The zone of Québec outside Montréal constitutes 18% of the Canadian populationover 16 years of age. With 10% of the survey's inventoried total of performances across Canada, 1,920 inventoried professional performances were offered during the 1990-91 Fall-Winter-Spring season, placing Québec second to Ontario (2,840) of the 8 provincial zones with regards to the frequency of inventoried performances.

From the programming of the 62 inventoried active professional facilities Québec City recorded the most opportunities to view the performing arts with 423 presentations, followed by Hull and Sherbrooke, which presented a combined total of 281 performances. The remaining 1,216 inventoried attendance opportunities for Québecers were distributed throughout 43 localities in 55 facilities. Volunteer presenters in Québec were not included in the survey.

4. CAPACITY	
< 400	20
400-800	28
800-1200	9
> 1200	5
Total	62

5. COMMUNITY SIZE	
5,000-10,000	84
10,000-100,000	27
> 100,000	4
Total	115

6. INVENTORIED PERFORMANCES FALL-WINTER-SPRING 1990-91

Type	Performances	% of national
Ballet	14	5%
Contem. dance	23	5%
Dance%	37	5%
Th. comedy	161	4%
Th. drama	269	6%
Th. av-garde	123	10%
Theatre%	553	6%
Opera%	35	13%
Symph. music	72	14%
Symph. "pop"	9	6%
Chamber mus.	123	22%
Contem. class.	8	6%
Choral music	14	8%
Classical%	226	15%
Traditional%	851	7%
Pop/rock	334	54%
Comedy	226	37%
Folk music	34	17%
Musicals	9	1%
Jazz/blues	35	14%
Count.& west.	4	6%
Popular%	642	19%
Child prod.	426	14%
Ethnic/herit.	1	1%
Other%	427	13%

Québec, outside of Montréal, appears to be very well equipped with active professional facilities. According to this survey's inventory, Québec had 48 facilities of less than 800 seats. There were 9 halls in Québec of between 800-1,200 seats, a capacity usually adaptable to a range of touring production,s such as theatre and variety performances. For large scale presentations of Popular performing arts, symphonic music, opera and ballet, Québec has 5 facilities of 1,200 seats or more serving the largest markets.

In Québec, the percentage of inventoried *Traditional performing arts* out of the total available presentations was 44%, and, as it relates to this survey's inventory, a proportion rather different from the national average of 64% Traditional performances to the total inventoried.

The inventory recorded for dance performances, though not conclusive, would appear to indicate there were limited opportunities for Québecers outside Montréal to view either ballet or contemporary dance in a professional facility during the surveyed season. In the category of theatre, the number of inventoried professional performances was not remarkable for the market, but they were relatively well distributed, with 67% being offered outside the major centre of Québec City. Again, as an indication rather than an absolute, the number of avant-garde theatre presentations (123) were notable in this inventory as they offered close to the same number of opportunities provided by theatre comedy. This is somewhat unusual given that this type of product normally thrives in larger urban centres.

Chamber music, it can be observed, accounted for more than 50% of the classical music performances in this zone's inventoried professional facilities.

As inventoried, *Popular performing arts* appeared to be well represented in Québec's surveyed distribution network, particularly pop/rock concerts, with 334 presentations (representing 54% of that type inventoried in this network nationally), and comedy performances.

Children's performances also appeared to offer numerous viewing opportunities with 426 presentations. While the relative absence of ethnic and heritage performances in this survey's inventory should not be taken too literally, it would appear to indicate that this type provided limited viewing opportunities to Québec audiences in the programming of inventoried professional facilities during the season.

2.6.2.2 Perceived Product Availability

While the majority of Québecers do not perceive that performing arts availability in their region is a problem, just over one third of those who expressed an interest in greater attendance cited "few performances in community," similar to the national average. Given the option of increased product availability, findings from the public again approximate the national average regarding their intention to attend more performances. There was, however, a large variation between the Québec public's response of 39% and that of Québec audiences, where only 28% (compared with 37% across Canada) indicate that greater availability would increase their attendance. This departure from the nationwide average is even more pronounced in markets of over 100,000 people.

At the same time, and something of a contradiction, Québec audiences are less likely than Canadian audiences to perceive the frequent or occasional availability of most Traditional and Popular performing arts. Ballet, contemporary dance, classical music genres and particularly opera are perceived as being less available than theatre.

Comedy, and to a lesser extent, pop/rock performances, are believed by audiences in Québec to be readily accessible, while musicals are perceived as occurring relatively infrequently, compared with the national average.

2.6.3 Perception of Facilities

More members of the Québec general public report having been frequently influenced by the facility in their decision to attend a performance than anywhere else in the country (25% in Québec compared with 20% nationally). But still, a majority (68%) say, as in the rest of the country, that the facility's influence can be both a positive and a negative factor in their decision-making process.

Québec has the lowest proportion (5%) of surveyed audiences saying that the facility had a negative influence on their decision to attend, equal only to the response of Montrealers. This result is also much lower than the corresponding result for Québec's general public (12%). Québec audiences are the most likely to say that a facility's impact

could be both negative and positive (69%), second highest only to the Montréal audience's rating.

Similar to other zones, the quality of the facility is the most important aspect of the facility in influencing the Québec general public's decision to attend a performance. Québecers rate the importance of the quality of sound and the comfort of seats slightly lower than rated nationally.

Two customer service elements, namely washrooms and ease of access to seats, are considered "very" important by a slightly higher proportion of the Québec general public than the national average. The appearance of the building, rated as having little importance on the national level, is of even less importance to Québecers in their decision to attend a performance.

Ratings of the quality of the facility by Québec audiences follows national trends with few exceptions. Sound is rated first with 41% and view of the stage comes second at 37%, while the average results are reversed (39%, 41%). Seating comfort is similar to the national average (23%). Customer services and ease of access elements are rated slightly higher by Québec audiences than elsewhere. The most notable difference is the ease of parking (28%), rated nine points above average.

2.6.4 ATTENDING MOTIVATIONS AND CONSTRAINTS

Too expensive price is cited by 59% of Québecers living outside of Montréal as an important reason for not attending more often, among those with an interest in attending more frequently. Further, the general public of Québec also indicate too few performances in their community (37%) and other obligations (35%) as barriers to increased attendance, consistent with the Canadian average.

An analysis of findings from the general public living in communities of 100,000 to a million people suggests that insufficient availability of performances is less of a constraint to attendance for Québecers than for the rest of the country, as only 13% cited this compared with 25% for Canada. However, this factor becomes more important in smaller communities. For example, 58% of respondents from communities of less than 10,000 find few performances the most important constraint, ahead of price.

Among the 10 elements influencing the general public's decision-making process with respect to attending performances, product-related reasons seem less important to Québecers, compared with the national average. The company or group of performers counts for 39% against the national average of 52%, and level of familiarity with the production (39% versus 48% nationally). Surprisingly, the particular piece presented is "very" important for more Québec respondents (56%) than for other Canadians (49%). The price of tickets is slightly less important (-4%), while the desire for an evening out is somewhat more important (+5%).

Questioned about their preference between local, national or international products, Québecers favour national visiting performers (19% compared with 9% in Canada). This question was designed to leave open the interpretation of the word national. In this zone, the nature of performance supply suggests that respondents prefer national productions, which mainly originate in Montréal.

When about to decide to attend a performance, the Québec audience considers price as slightly less important than the national average (70% versus 75%). Most factors relating to the performance are rated as "very" important by more Québec audiences than the national average. These include the specific performers (44%, 23%), the company or the group (41%, 37%) and level of familiarity with the performance (16%, 11%). Word of mouth and the performing company's reputation are significantly less of a decisional factor for Québec audiences, than for the rest of Canada.

Finally, the audience of this zone scores the highest in Canada in preferring national performers, and seems satisfied by the volume of performances offered (only 14%, versus 20% for Canada, agree "strongly" with the statement that they would attend more if more performances were offered).

2.6.5 Pricing Issues

As indicated in Table 7, on average, the Québec general public outside Montréal paid an average of $17 each for tickets to their last professional performance, less than the average ticket price other Canadians paid. The general public in Québec also would generally prefer to pay somewhat less than other Canadians for a ticket to a future performance.

The numbers of people uninterested in attending performances is about the same as the Canadian average in almost all cases; the exceptions being children's music/theatre, where a few more are interested than the Canadian average, and folk music, where slightly fewer are interested.

Québec audience respondents, however, were less likely than other Canadians to be interested in attending future performances, except for pop/rock and children's music/theatre performances. As Table 7 illustrates, there is no pattern of interest by the size of the community, although for some art forms, like classical music and theatre, there are notable differences by community size.

Audience respondents in Québec outside Montréal paid as much as other Canadians for their most recent performance attendance, but, like the general public in Québec, are generally prepared to pay less than other Canadians to attend in the future. The only exception to this trend is for pop/rock concerts, where they are willing to pay as much as other Canadians.

Interest in attending performances is greater in the smaller communities for jazz/blues, pop/rock, children's, and especially folk music. For dance performances, those in mid-sized centres are the most interested.

A higher proportion of Québecers in larger cities of over 100,000 people, outside of Montréal, indicate that they would not be willing to pay any additional amount for a single ticket to the performance compared with those in mid-sized or rural communities. Moreover, performance attenders in rural Québec are more likely to say they would be willing to pay, at most, an additional $2.

Table 7

Québec Outside Montréal:
TICKET PRICES PAID & PREPARED TO PAY

	COMMUNITY SIZE					
	100,000 or more		10,000 to 99,999		Under 10,000/rural	
	%		%		%	
	GP	AUD.	GP	AUD.	GP	AUD.
AMOUNT PAID FOR LAST PROFESSIONAL PERFORMANCE ATTENDED						
Dollar average	$19	$26	$18	$21	$15	$18
Gift	10	1	8	2	5	2
AMOUNT NORMALLY PREPARED TO PAY FOR SINGLE TICKET						
Dance:						
Dollar average	$13	$16	$11	$14	$10	$14
Not interested	21	22	25	13	30	22
Theatre:						
Dollar average	$16	$18	$16	$17	$15	$16
Not interested	4	3	10	2	0	7
Classical music:						
Dollar average	$15	$19	$13	$16	$16	$16
Not interested	28	15	44	19	36	21
Jazz/blues:						
Dollar average	$13	$14	$12	$13	$12	$18
Not interested	33	40	38	28	39	34
Folk music:						
Dollar average	$10	$13	$9	$11	$10	$13
Not interested	44	53	42	39	42	36
Pop/rock:						
Dollar average	$19	$19	$17	$17	$18	$17
Not interested	20	34	17	20	18	24
Child music/theatre:						
Dollar average	$10	$10	$12	$9	$8	$9
Not interested	28	39	31	25	30	30
Professional sports:						
Dollar average	$15		$21		$17	
Not interested	29		29		23	

2.7 New Brunswick

2.7.1 Psychographics, Behaviour and Intention

Table 1 — Psychographic Segments

VALUES TOWARD THE ARTS

	N.B.	NATIONAL AVERAGE
	%	%
Devoted	3	8
Believers	12	17
Practitioners	10	14
Conditionals	19	18
Uncommitted	14	14
Uninvolved	30	17
Carefree Pop/Rockers	8	6
Tuned Out	4	6

Residents of New Brunswick appear to hold more negative attitudes toward the arts than the average. Only 28% of the population are found in the top three segments, compared with 39% nationally. At the same time, few are in the stay-at-home Tuned Out group. Over one quarter (30%) are found in the Uninvolved group. This suggests that when they seek entertainment outside the home, their orientation is not necessarily in the direction of the performing arts.

Both language groups, in the general public survey, in New Brunswick report attendance at Traditional and Popular performance types. However, for both groups the proportion of the population reporting attendance is lower than most other parts of the country. In terms of the Traditional performing arts, 35% and 36% respectively of Anglophones and Francophones report attendance in the last six months.

Reported attendance at Popular performing arts events, though, indicates that Francophones are more likely to report attendance in the last six months than Anglophones (54% versus 46%)

Residents of New Brunswick report lower than average attendance at the Traditional performing arts in the past six months, and are more likely than the national average to say they have never attended such an event.

However, these differences between residents of New Brunswick and the national average are most pronounced in the community with a population of 100,000 and over, and cease to be significant in the many smaller communities within the province. Attendance at Traditional performing arts reflects the national average for residents of communities with a population of under 100,000 people.

In general, attendance at Popular performing arts also reflects the national average, especially for those people living in communities of under 100,000 people. Attendance at such events is highest among residents of communities with populations between 10,000 and 100,000.

As shown in Table 2, of those who attended performances of Traditional performing arts in the last six months, people residing in mid-sized communities (10,000 to 100,000 people) express more interest in attending such events more often than people residing in rural or in larger communities.

Table 2

General Public: New Brunswick
COMMUNITY SIZE VARIATIONS IN ATTENDANCE PATTERNS &INTEREST IN ATTENDING MORE TRADITIONAL & POPULAR PERFORMING ARTS*

	100,000 or more	10,000 to 99,999	Under 10,000/rural	Zone average
	%	%	%	%
ATTENDANCE/TRADITIONAL PERFORMING ARTS				
Attended last six months	35	41	33	35
Attended last five years	19	18	20	19
Never attended	46	41	47	46
INTEREST IN ATTENDING MORE TRADITIONAL PERFORMING ARTS				
Attended last six months:				
Interested	29	35	23	27
Content	6	7	10	8
Attended last five years:				
Interested	13	14	23	12
Content	6	4	9	7
Never attended:				
Interested	15	14	16	15
Content	31	26	31	30
ATTENDANCE/POPULAR PERFORMING ARTS				
Attended last six months	48	52	50	49
Attended last five years	26	27	23	25
Never attended	26	21	27	26
INTEREST IN ATTENDING MORE POPULAR PERFORMING ARTS				
Attended last six months:				
Interested	38	45	41	41
Content	9	7	9	8
Attended last five years:				
Interested	21	22	17	19
Content	6	5	6	6
Never attended:				
Interested	13	10	13	13
Content	13	11	14	13

This is also the case among those people who have attended one of the Popular performing arts in the last six months. Those most likely to express an interest in attending these events more often are residents of communities with a population of 10,000 to 100,000. Attitudes here match the national average for this community size.

2.7.2 PRODUCT AVAILABILITY

2.7.2.1 Inventoried Product Availability

Table 3

Pop. (000)	562,8	Inventoried Facilities	17	Inventoried Performances 90/09-91/06	205
% of Total	3	% of Total	5	% of Total	1

New Brunswick, with 3% of the Canadian population over 16 years of age, had 205 inventoried professional performances or 1% of the nationwide total of 18,955 inventoried presentations. New Brunswick's 17 inventoried active professional facilities represent 5% of the national distribution network.

Fredericton, perhaps the best served of the New Brunswick communities, was offered 134 of the 205 inventoried performances. The six other communities in the inventoried distribution network had a total of 71 opportunities during the season for attending a performing arts performance. Small community presenters with no access to professional facilities have not been inventoried.

4. CAPACITY	
< 400	2
400-800	11
800-1200	2
> 1200	2
Total	17

5. COMMUNITY SIZE	
5,000-10,000	18
10,000-100,000	5
> 100,000	1
Total	24

6. INVENTORIED PERFORMANCES FALL-WINTER-SPRING 1990-91

Type	Performances	% of national
Ballet	7	2%
Contem. dance	10	4%
Dance%	17	2%
Th. comedy	37	1%%
Th. drama	83	2%
Th. av-garde	0	0%
Theatre%	120	1%
Opera%	1	0%
Symph. music	1	0%
Symph. "pop"	2	1%
Chamber mus.	10	2%
Contem. class.	0	0%
Choral music	4	2%
Classical%	**17**	**1%**
Traditional%	**155**	**1%**
Pop/rock	15	2%
Comedy	5	1%
Folk music	2	1%
Musicals	0	0%
Jazz/blues	4	2%
Count.& west.	1	1%
Popular %	**27**	**1%**
Child prod.	23	1%
Ethnic/herit.	0	0%
Other%	**23**	**1%**

As elsewhere in Canada, most (76%) of New Brunswick's inventoried facilities were less than 800 seats. Unlike most other zones, however, the majority of these were halls of 400-800 seats. This capacity is suitable for medium-sized productions serving markets of under 100,000.

There were 4 facilities of greater than 800 seats located in 4 different markets making larger productions potentially accessible to most New Brunswickers.

The *Traditional performing arts* offered the most opportunities to attend a professional performance in New Brunswick. Theatre accounted for the recorded greatest frequency with 120 presentations; however, there were no inventoried viewing opportunities recorded for experimental or avant-garde type of theatre in the surveyed network of facilities.

While not conclusive, this survey's inventory indicates as well that New Brunswick audiences had very little opportunity of attending either a performance of opera (one inventoried for the season), or any type of classical music, which offered a total of 17 presentations at the professional facilities surveyed.

There were few inventoried opportunities in the category of *Popular performing arts*,, however this is only an indication of the availability in the surveyed distribution network and not what may be present (in nightclubs for example) outside of it. The lack of inventoried opportunities for New Brunswickers to attend a musical during the season, while not definitive, does suggest this type offered limited occasions for viewing in the inventoried professional halls.

2.7.2.2 Perceived Product Availability

A significant two thirds of both the general public and audiences in New Brunswick identify the lack of available product as a reason for not attending more performances. An equal number say they would attend more if more performances were available in their communities.

While the perception of a lack of product availability in New Brunswick's rural and mid-sized communities falls within range of the national average, New Brunswick residents living in the largest centres are twice as likely as elsewhere to perceive a lack of availability in their community.

In the Traditional performing arts, New Brunswick audiences believe that large scale productions such as opera, ballet and symphonic music, as well as avant-garde theatre and contemporary classical music are infrequently available in their communities. Theatre comedy and theatre drama are cited most often as being frequently or occasionally available. In fact, in this survey theatre comedy and theatre drama accounted for close to 60% of the inventoried performances available to New Brunswickers, with minimal inventoried opportunities provided in all other categories.

2.7.3 PERCEPTION OF FACILITIES

The frequency and type of influence that the facility has on the New Brunswick general public's decision to attend a performance is similar to the national average, with the exception that, like Québecers, they tend to be more frequently influenced by the facility in their decision to attend a performance than residents of other zones.

Audiences from New Brunswick on the other hand, indicate that they are not as frequently influenced by the facility as the average Canadian. Only 15% mention that the facility has a frequent influence on their decision to attend a performance, the lowest percentage in the country. This could suggest that the general public's high expectations are not met by facilities in this zone.

Accordingly, a higher percentage of the general public of New Brunswick than the national average rates facility features as "very" important. They seem especially concerned by customer service features such as washrooms, (12% above the national average), and cleanliness of the hall and the lobby (both 5% above the national average). The appearance of the building is rated 6% above average as being very important for general public respondents.

In fact, facility features that most influence the New Brunswick general public seem disappointing to this zone's audiences. Washrooms, lobby and appearance of the building, which are said to be more important to New Brunswicks' population than to the average Canadian, are rated "excellent" by a smaller percentage of surveyed audience members than the national average.

Another customer service is of some concern. Beverage services are less likely to be rated as "excellent" (8% under the national average). Getting to the facilities also seems a little more problematic for New Brunswick audiences than for average audiences,

since this feature is rated "excellent" by only 27% of responding audiences, 5% less than national audience ratings.

2.7.4 Attending Motivations and Constraints

As noted previously, the lack of available product seems to characterize the performing arts scene in New Brunswick. In fact, as many as 60% of the general public residing in the zone, the highest proportion in Canada, cite this as a reason for not attending and this proportion increases to 68% in rural areas.

A majority of the New Brunswick general public (60% compared with 37% nationally) agree they would attend more performances if more were available, the highest such result in the country. Residents of Saint John, the one community of 100,000 and over, say that they would attend more if more were offered (57%, again the highest score in Canada, compared with 28% nationally). In communities of less than 10,000, the results reach a high of 68%.

Price is the second most important reason for not attending, as performances are considered to be too expensive by 48% of the general public (9% less, however, than the national average). The "no time" argument does not appear to have any special significance in this zone, compared with other zones.

The two primary reasons given by audiences for non-attendance are lack of performances (first across Canada with 74%) and accessibility, that is difficulty in getting to the performance (48%, one of the highest in the country). Furthermore, 37% of New Brunswick audiences agree "strongly" they would attend more performances if more were available, while the national average is only 20%. When those who agree "somewhat" are considered, the figure becomes 61%, mirroring the general public, and the highest proportion of audiences in Canada to say they would attend more performances if more were available.

Information also seems to be a problem for 39% of New Brunswickers, this is significantly above the Canadian average (34%). Again, price does not appear as an important factor in New Brunswick. Compared with the national average, 9% fewer New Brunswickers cite price as a reason not to attend. In communities of 10,000 or less, the price of the ticket scores the lowest in terms of being perceived as a "very" important decisional factor.

With respect to factors influencing the decision to attend a performance, the general public of New Brunswick shows some variations from the Canadian average. For example, the company or the group of performers presenting the production (29% versus 23%) and the facility where the performance is presented (25% versus 18%) are cited as very important.

The general public of New Brunswick tends to favour visiting national companies (13% versus 9% for Canada). Confirming the desire to see visiting companies and probably reflecting the small number of local companies, respondents from communities of 10,000 to 100,000 people show the lowest degree of preference for local performers in Canada (3% versus 9%).

Similar to the general public, New Brunswick audiences tend to favour national (17%) and international (15%) visiting companies, while they demonstrate a weak preference

(6%) for local performers. Audience members residing in the largest community consider as "very" important the reputation of the company or group of performers (30%), the specific facility (22%) and the reviews and comments in the media (14%). All three figures are significantly above Canadian averages.

2.7.5 Pricing Issues

The average price paid by the general public of New Brunswick for the last professional performance attended is well below the national average. As is evident in Table 7, there is little variation within the province, according to community size.

This lack of significant variation due to the size of the community is also evident in attitudes toward the price they would pay for a single ticket to any of the performances listed in Table 7.

Variations in attitudes across community size are evident in the proportions indicating that they would not be interested in paying any amount to attend that type of performance. Of all communities in New Brunswick, residents of the community with a population of 100,000 and over are the least interested in attending performances of jazz/blues, folk music, pop/rock, children's music or theatre, and professional sports. Residents of communities with a population between 10,000 and 100,000 have the lowest interest in attending performances of dance and classical music. Rural residents of New Brunswick express the least amount of interest in attending a theatrical performance. Among audiences, the amount paid for the performances surveyed is also below average ($18 versus $22). When community size is considered, those in the smallest communities paid the most ($27). However, caution is advised when considering this result since it is based on only 42 cases.

Table 7 summarizes findings from the audience sample gathered from the zone. The average price audiences in New Brunswick are willing to pay for a single ticket to the events listed in Table 7 are substantially below the national average with the exception of those people living in communities with a population between 10,000 and 99,999 who express a willingness to pay prices similar to the national average. The average dollar amount residents of New Brunswick are prepared to pay for the performances listed in the table differ only marginally from national averages.

As is evident in Table 7, residents of communities with a population of 100,000 or more are much more likely than residents of smaller communities to state that they are not interested in attending performances of folk music. People living in rural areas of New Brunswick are most likely to express no interest in attending a performance of jazz/blues and pop/rock music, while being the least likely to say they are not interested in attending performances of dance and classical music.

Residents of rural New Brunswick and part of our audience sample are notably more likely than residents from larger communities to say they would pay as much as ten dollars more for a single ticket to the performance — and by quite a large margin. While 10% of those in urban centres over 100,000 people and merely 2% of those in mid-sized communities say they would pay ten dollars more for a single ticket, as many as 42% of those living in rural communities say they would pay ten dollars more.

Table 7

New Brunswick:
TICKET PRICES PAID &PREPARED TO PAY

	COMMUNITY SIZE					
	100,000 or more		10,000 to 99,999		Under 10,000/rural	
	%		%		%	
	GP	AUD.	GP	AUD.	GP	AUD.
AMOUNT PAID FOR LAST PROFESSIONAL PERFORMANCE ATTENDED						
Dollar average	$17	$14	$15	$19	$15	$27
Gift	8	6	7	5	8	0
AMOUNT NORMALLY PREPARED TO PAY FOR SINGLE TICKET						
Dance:						
Dollar average	$12	$13	$12	$17	$11	$15
Not interested	28	11	32	10	19	3
Theatre:						
Dollar average	$15	$15	$15	$20	$13	$17
Not interested	10	2	6	1	15	3
Classical music:						
Dollar average	$16	$16	$17	$19	$15	$17
Not interested	36	10	38	11	32	3
Jazz/blues:						
Dollar average	$13	$12	$13	$15	$13	$14
Not interested	40	21	30	24	38	29
Folk music:						
Dollar average	$13	$10	$13	$14	$11	$12
Not interested	31	31	27	18	22	21
Pop/rock:						
Dollar average	$20	$15	$18	$17	$17	$14
Not interested	20	18	10	29	15	39
Child music/theatre:						
Dollar average	$8	$9	$10	$11	$10	$8
Not interested	40	27	26	37	22	36
Professional sports:						
Dollar average	$16		$15		$15	
Not interested	28		27		18	

2.8 Atlantic Provinces, not including New Brunswick

2.8.1 PSYCHOGRAPHICS, BEHAVIOUR AND INTENTION

Table 1 — Psychographic Segments
VALUES TOWARD THE ARTS

	ATL.	NATIONAL AVERAGE
	%	%
Devoted	4	8
Believers	17	17
Practitioners	11	14
Conditionals	19	18
Uncommitted	15	14
Uninvolved	20	17
Carefree Pop/Rockers	7	6
Tuned Out	7	6

Attitudes in the rest of the Atlantic region are not as negative toward the arts as those found in New Brunswick. However, above average proportions of the population are found in the less interested segments, notably the Conditionals and the Uninvolved.

Attendance patterns at both Traditional and Popular performing arts vary significantly in the Atlantic zone when compared with the national average. Although figures for attendance in the last five years tend to be more consistent with national findings, Atlantic zone residents are far less likely to report having attended either a Traditional or Popular arts performance in the last six months. The residents of this zone are also much more likely to say that they have "never attended."

Examining behaviour according to community size within the zone, a trend reflecting the findings in other provincial regions is uncovered. Attendance by those living in larger communities of over 100,000 is relatively consistent with the nation overall. The lower provincial average is driven down by those in mid-sized and rural communities where attendance is considerably lower. The magnitude of this influence is stronger in the Atlantic zone due to the higher incidence of mid-sized and rural communities.

Not surprisingly, community size also impacts on the intention of residents in the Atlantic zone to attend both Traditional and Popular arts performances more often. Residents living in larger communities of over 100,000 who have attended a performance in the last six months are notably more inclined to say that they would be interested in attending more often, especially when compared with those living in rural areas.

Table 2

General Public: Atlantic Provinces Not Including New Brunswick
COMMUNITY SIZE VARIATIONS IN ATTENDANCE PATTERNS & INTEREST IN ATTENDING MORE TRADITIONAL & POPULAR PERFORMING ARTS

	100,000 or more %	10,000 to 99,999 %	Under 10,000/rural %	Zone average %
ATTENDANCE/TRADITIONAL PERFORMING ARTS				
Attended last six months	38	37	23	31
Attended last five years	19	20	13	17
Never attended	42	42	63	52
INTEREST IN ATTENDING MORE TRADITIONAL PERFORMING ARTS				
Attended last six months:				
Interested	32	28	18	25
Content	7	9	6	7
Attended last five years:				
Interested	16	12	9	12
Content	3	8	4	4
Never attended:				
Interested	14	19	19	17
Content	28	24	44	35
ATTENDANCE/POPULAR PERFORMING ARTS				
Attended last six months	58	51	38	47
Attended last five years	20	20	24	22
Never attended	22	28	38	31
INTEREST IN ATTENDING MORE POPULAR PERFORMING ARTS				
Attended last six months:				
Interested	53	45	33	42
Content	5	6	4	5
Attended last five years:				
Interested	17	19	18	18
Content	4	1	6	4
Never attended:				
Interested	9	12	19	14
Content	12	17	19	16

2.8.2 PRODUCT AVAILABILITY

2.8.2.1 Inventoried Product Availability

Table 3

Pop. (000) 1,233,4	Inventoried Facilities 20	Inventoried Performances 90/09-91/06 672
% of Total 6	% of Total 6	% of Total 4

The Atlantic provinces, not including New Brunswick, account for 6% of the Canadian population over 16 years of age. Between Newfoundland, Prince Edward Island and Nova Scotia, 672 inventoried professional performances were distributed through a network of 20 inventoried active professional facilities. While this network represents 6% of the nationwide total, the inventoried facilities were not equitably distributed among the three provinces.

Nova Scotia had the greatest advantage for professional performance distribution with 9 of the inventoried facilities. According to the inventory, Halifax had 305 opportunities to view a performing arts presentation. Newfoundland, with 6 inventoried professional facilities at its disposal had 158 inventoried professional performances available to audiences in St. John's. Prince Edward Island, with only one main inventoried facility in Charlottetown, presented 26 opportunities to attend a live performance, and the remaining 183 performances of the surveyed network were distributed throughout 13 communities in Nova Scotia and Newfoundland. Volunteer presenters with no access to professional facilities were not surveyed to any significant degree.

4. CAPACITY	
< 400	10
400-800	5
800-1200	4
> 1200	1
Total	20

5. COMMUNITY SIZE	
5,000-10,000	40
10,000-100,000	11
> 100,000	2
Total	53

6. INVENTORIED PERFORMANCES FALL-WINTER-SPRING 1990-91

Type	Performances	% of national
Ballet	6	2%
Contem. dance	21	5%
Dance %	27	4%
Th. comedy	120	3%
Th. drama	261	6%
Th. av-garde	2	1%
Theatre %	383	4%
Opera	3	3%
Symph. music	26	5%
Symph. "pop"	4	3%
Chamber mus.	22	4%
Contem. class.	6	5%
Choral music	10	6%
Classical %	68	4%
Traditional %	481	4%
Pop/rock	11	2%
Comedy	6	1%
Folk music	29	14%
Musicals	39	2%
Jazz/blues	12	5%
Count. & west.	17	26%
Popular %	114	3%
Child prod.	64	2%
Ethnic/herit.	13	7%
Other %	77	4%

Half of the inventoried Atlantic zone halls had less than 400 seats, the usual capacity for presenting children's shows, experimental theatre and dance and some variety performances which are enhanced by a more intimate environment.

The facilities with greater than 800 seats potentially more efficient for presenting medium to large scale productions, were concentrated in Nova Scotia with 3 halls inventoried in 3 different markets. The other two larger facilities are located in St. John's, Newfoundland, and Charlottetown, Prince Edward Island. However, the overall distribution of facilities with diverse capacities would appear to favour markets located in Nova Scotia.

Of the 672 performances inventoried in the Atlantic zone, 481 were *Traditional performing arts.*

Theatre, with 383 presentations, represented almost 80% of inventoried opportunities. Theatre drama (261) was offered in the surveyed distribution network twice as often as theatre comedy (120). It would appear that the opportunities to attend a performance of avant-garde theatre were limited, but this is not unexpected outside of the major urban centres.

There were 68 inventoried presentations of classical music available to Atlantic audiences. Within this inventory, during the surveyed season, there were 26 opportunities to attend a symphonic music concert, and 22 occasions to attend a chamber music performance.

In the *Popular performing arts,* while musicals were the most frequently presented with 39 performances, it is interesting to note an above average availability in this network of both folk, and country and western music.

2.8.2.2 Perceived Product Availability

The perception of a lack of performances in the Atlantic zone reflects that of New Brunswick. That portion of the general public interested in increased viewing opportunities in both regions is the most likely of all zones to cite "few performances in community" as their reason for not attending more performances.

A large proportion of the audience in the Atlantic zone, more than in any other zone, indicate they would attend more often given greater product availability, (64% as opposed to the 37% nationwide average). While responses from rural audiences are within the range of responses from rural communities across Canada, the audiences in the Atlantic zone residing in mid-sized (10,000 to 100,000), and more significantly, in the two major centres perceive they have few opportunities of attending performances in their communities (respectively, 68% and 56%).

Audiences mention theatre comedy, theatre drama and musicals most often as being frequently or occasionally available. Dance, avant-garde theatre, classical music and opera are perceived to be the least available.

Audiences in the Atlantic zone, like those of New Brunswick, also feel there are fewer opportunities on average of viewing the Popular performing arts, except for folk and country and western music. While not greatly present in the inventory of the surveyed facilities, variety performances are often presented in venues, such as commercial clubs, outside this network.

2.8.3 PERCEPTION OF FACILITIES

The general public of the Atlantic zone are as likely as other Canadians to indicate that a facility only occasionally influences their decision to attend a performance (36% zonally and nationally). Those residents are also as likely to say that the type of influence, positive or negative, depends on the facility (63% zonally and 66% nationally).

The surveyed audiences of the Atlantic zone, along with those of Vancouver, have the greatest tendency to be only occasionally influenced by the facility when deciding to attend a performance. In fact, this zone has the highest percentage of audience members answering that they are only occasionally or rarely influenced by the facility. This influence is also more likely in the Atlantic zone than in any other to deter audiences from attending a performance. In fact, the response rate to the facility as a negative influence is 18%, the highest of all 11 zones and twice the national average.

When asked to rate the importance of different facility features, a larger proportion of the population of the Atlantic zone indicates that the features are "very" important. Customer services are particularly more important to the general public of this zone, than for Canadians overall. As in New Brunswick, the washrooms are rated as "very" important by a higher proportion than nationally (10% higher). All other customer service features are rated between 5% and 7% higher than the national average. The only exception is the quality of the house program, which is considered somewhat less important by Atlantic zone residents (22%).

Among the features of facility quality, the comfort of seats stands out, and is considered as "very" important by a higher proportion of residents from the Atlantic zone. Access to the facility, although always the second most important feature in the decision-making process, is more important to the population of the Atlantic zone by a 7% margin than other Canadians.

Except for the features determining the quality of the experience, audiences in the Atlantic zone rate each feature of the facility equal to or slightly under the national average. While these features are especially relevant to the general public, audiences in the Atlantic zone are less likely to rate customer service features as "excellent.".

As in the rest of the country, only a minority of the audience perceive the sound, sight and seating features as "excellent." In this zone, the view of the stage comes closest to being rated "excellent" by half the attending audiences. Considered more important to the Atlantic zone general public than to Canadians overall, the comfort of seating (28%) also receives a 5% higher rating from Atlantic audiences than the national average. The quality of sound is also rated excellent by 5% more of the Atlantic zone audience members than the national average.

2.8.4 ATTENDING MOTIVATIONS AND CONSTRAINTS

The main concern in the Atlantic zone, as in New Brunswick, appears to be the lack of available performances. For the general public, it is the most important reason for not attending (72%), and the second highest score in Canada after New Brunswick. Price, the first constraint nationally, is rated fifth in the Atlantic zone at 43%, 10 points lower than national average.

While lack of time does not appear to be a significant obstacle to attendance, less interest in the Traditional performing arts is cited as an important reason for non-attendance by 46% of the Atlantic zone's general public, somewhat greater than the national average of 42%. Difficulty in getting to the facility is also perceived as a problem (45%, compared with 39% for the rest of Canada).

It is interesting to note how respondents expressing an interest in attending more performances rank their reasons for not attending more: too few performances (58% versus 35% nationally), prices too expensive (48%, or 9% less than the Canadian average) and no place in the community for performances (32%, the highest in Canada and more than double the national average of 14%).

In communities of 100,000 people or more, price is the first obstacle, followed by lack of availability of performances. The lack of performances is the primary reason for not attending among those in the smaller communities.

The ranking of factors influencing the general public's decision to attend a particular performance does not vary greatly from the national average, with the exceptions of the company or the group of performers presenting the production, which scores 61% (second strongest in Canada), and the level of familiarity with the performance (58% versus a national average of 48%).

The ticket price is a very important issue for 47% of the general public in communities of 10,000 to 100,000, the highest such rating in Canada. The specific facility where the

performance takes place is also "very" important for 30% of the population, again, the highest rating nationwide.

Preferences for both national and international performers, as indicated by the general public, reflect national tendencies. While the first preference is for international performers, the Atlantic residents' preference for local performers is somewhat higher than the average nationally, particularly in communities with a population of 10,000 to 100,000 people.

Although they do not differ significantly from the national average regarding the origin of performing companies, Atlantic audiences indicate their first preference is for visiting national companies.

Among Atlantic audiences, two-in-three agree "strongly" and "somewhat" that they would attend more if more performances were offered, the highest response in Canada.

2.8.5 PRICING ISSUES

Residents in the Atlantic zone paid significantly less than the national average for the last professional performance they attended. Although the amount paid in moderate and mid-sized communities was lower, the strength of this regional variation can be largely attributed to the low prices being paid by residents in rural communities.

With the exception of folk music and children's dance/music/theatre, the Atlantic zone general public are prepared to pay slightly less than the national average for a single ticket to any of the types of performances listed in Table 7.

Variations according to community size within the Atlantic region are minimal. However, with the exception of pop/rock and professional sports, those living in rural communities are prepared to pay slightly less for a single ticket.

Findings from the audience sample indicate not only that Atlantic Canadians pay less than the national average for their performance ticket, but also that the average price per ticket is lower than any other province or region.

Examining the behaviour within the province according to community size, it is interesting to note that the average amount paid for the last professional performance attended by residents of rural areas in the Atlantic region is significantly greater than the average paid in larger communities. These findings contrast the general public survey, where rural residents were found to pay less. Despite this variation in average price paid, there is very little distinction among communities regarding the amount they are prepared to pay for the different types of performances listed.

Within the Atlantic zone, residents of rural communities in our audience sample would pay more for a single ticket, compared with those in larger community sizes. Interestingly, not even one respondent in a larger urban centre of over 100,000 people indicates that they would be willing to pay an additional ten dollars for a single ticket.

Table 7

Atlantic Provinces Not Including New Brunswick:
TICKET PRICES PAID & PREPARED TO PAY

	COMMUNITY SIZE					
	100,000 or more		10,000 to 99,999		Under 10,000/rural	
	%		%		%	
	GP	AUD.	GP	AUD.	GP	AUD.
AMOUNT PAID FOR LAST PROFESSIONAL PERFORMANCE ATTENDED						
Dollar average	$17	$13	$17	$15	$11	$21
Gift	7	5	3	2	8	4
AMOUNT NORMALLY PREPARED TO PAY FOR SINGLE TICKET						
Dance:						
Dollar average	$13	$17	$11	$15	$9	$15
Not interested	31	14	34	16	20	18
Theatre:						
Dollar average	$15	$20	$14	$18	$13	$17
Not interested	14	2	17	3	20	3
Classical music:						
Dollar average	$16	$21	$14	$17	$14	$18
Not interested	41	6	44	11	42	10
Jazz/blues:						
Dollar average	$15	$15	$13	$15	$12	$13
Not interested	30	22	35	28	42	21
Folk music:						
Dollar average	$14	$15	$14	$13	$11	$13
Not interested	32	22	26	15	23	26
Pop/rock:						
Dollar average	$21	$19	$17	$17	$20	$15
Not interested	12	32	18	28	18	23
Child music/theatre:						
Dollar average	$9	$11	$10	$10	$8	$9
Not interested	34	38	31	29	28	32
Professional sports:						
Dollar average	$16		$15		$19	
Not interested	16		22		20	

2.9 Vancouver

2.9.1 PSYCHOGRAPHICS, BEHAVIOUR AND INTENTION

Table 1 — Psychographic Segments
VALUES TOWARD THE ARTS

	VAN.	NATIONAL AVERAGE
	%	%
Devoted	10	8
Believers	19	17
Practitioners	16	14
Conditionals	12	18
Uncommitted	21	14
Uninvolved	10	17
Carefree Pop/Rockers	3	6
Tuned Out	8	6

Vancouver residents are above average in their representation in the first three segments, as expected with a large urban population. In all, 45% of the population are to be found in one of these segments compared with 39% for the nation overall.

When reported ethnic backgrounds are considered, among the general public, there is little variation. Among those of British/Irish background 53% report that they attended a Traditional performing arts event during the six months preceding the survey, compared with 50% of those giving their background as French/French Canadian, 51% among those giving their background as European, and 47% of those reporting being of Asian descent. Variations for the Popular performing arts are similarly small.

Vancouverites are slightly more likely to report having attended one of the Traditional performing arts in the past six months than their fellow British Columbians. Correspondingly, residents of Vancouver are less likely than other British Columbians to report that they have "never attended" the Traditional performing arts.

In terms of attendance at the Popular performing arts, Vancouverites, along with Torontonians, are the most likely of all Canadians to have attended within the past five years. Similarly, the proportion of Vancouverites who indicate that they have never attended the Popular performing arts is virtually identical to that of Torontonians, the lowest proportion in the country.

It is also apparent from the following table that the residents of Vancouver who have attended the Traditional performing arts in the past six months are more interested in attending these performances more frequently than other British Columbians who have attended these types of performing arts. Likewise, among those who have attended the Popular performing arts in the past six months, interest in attending these performances more often is higher among Vancouverites than other residents of British Columbia.

Table 2

General Public: Vancouver
COMMUNITY SIZE VARIATIONS IN ATTENDANCE PATTERNS & INTEREST IN ATTENDING MORE TRADITIONAL & POPULAR PERFORMING ARTS

	VANCOUVER %	B.C OUTSIDE OF VANCOUVER %
ATTENDANCE/TRADITIONAL PERFORMING ARTS		
Attended last six months	50	46
Attended last five years	21	21
Never attended	28	33
INTEREST IN ATTENDING MORE TRADITIONAL PERFORMING ARTS		
Attended last six months:		
Interested	41	36
Content	9	9
Attended last five years:		
Interested	16	16
Content	6	6
Never attended:		
Interested	13	13
Content	15	19
ATTENDANCE/POPULAR PERFORMING ARTS		
Attended last six months	62	52
Attended last five years	23	22
Never attended	15	25
INTEREST IN ATTENDING MORE POPULAR PERFORMING ARTS		
Attended last six months:		
Interested	52	45
Content	10	8
Attended last five years:		
Interested	19	17
Content	4	6
Never attended:		
Interested	7	12
Content	9	13

2.9.2 PRODUCT AVAILABILITY

2.9.2.1 Inventoried Product Availability

Table 3

Pop. (000)	1,240	Inventoried Facilities	20	Inventoried Performances 90/09-91/06	2,115
% of Total	6	% of Total	6	% of Total	11

Vancouver, with 6% of Canada's population over 16 years of age, and 2,115 inventoried professional performances, accounted for 11% of the 18,955 performances inventoried nationally. The distribution network of 20 inventoried active professional facilities, however, seems somewhat lacking for a major urban centre of this size.

4. CAPACITY	
< 400	15
400-800	3
800-1200	-
> 1200	2
Total	20

5. COMMUNITY SIZE	
5,000-10,000	-
10,000-100,000	-
> 100,000	1
Total	1

6. INVENTORIED PERFORMANCES FALL-WINTER-SPRING 1990-91

Type	Performances	% of national
Ballet	20	7%
Contem. dance	39	9%
Dance %	59	8%
Th. comedy	389	10%
Th. drama	385	9%
Th. av-garde	15	1%
Theatre %	789	8%
Opera %	**31**	**11%**
Symph. music	60	12%
Symph. "pop"	13	9%
Chamber mus.	45	8%
Contem. class.	9	7%
Choral music	18	11%
Classical %	**145**	9%
Traditional %	**1,024**	8%
Pop/rock	24	4%
Comedy	16	3%
Folk music	40	20%
Musicals	277	16%
Jazz/blues	26	10%
Count. & west.	5	8%
Popular %	388	11%
Child prod.	663	21%
Ethnic/herit.	40	21%
Other %	703	21%

Vancouver is the third largest performing arts market in Canada and was served, according to the inventory, by a total of 20 active professional facilities.

Three quarters of these facilities had under 400 seats, a capacity ordinarily associated with small scale productions such as experimental theatre and dance, children's shows and some types of variety where an intimate venue is more effective. There were no facilities in the 800-1,200 seat range inventoried in Vancouver, which would appear to limit its capability to offer certain mid-scale productions in their ideal capacity size.

Vancouver had 2 halls with the capacity to potentially house the technically and spatially more demanding productions of ballet, opera and symphonic music, compared to Toronto with 6 and Montréal which had 8 inventoried large scale halls.

This survey inventoried 1,024 opportunities for Vancouver audiences to view a *Traditional performing arts* presentation. Comprising almost 50% of the total inventoried attendance opportunities in this city, this proportion is markedly different than was exhibited in Toronto and Montréal, where the Traditional performing arts accounted for respectively 67% and 75% of the total inventory of presentations.

Theatre provided Vancouverites with the most opportunities to attend performances. It is interesting to note that the 789 presentations were equally weighted between theatre comedy (389) and theatre drama (385). In the distribution network surveyed, there were 15 presentations of avant-garde theatre during the season.

Individuals wishing to see a symphony, a symphonic "pops" concert or choral music were, to the extent of this inventory, comparatively well served in relation to inventoried performances of this type in Toronto and Montréal.

In the *Popular performing arts*, the 388 available presentations were expectedly low given the distribution network surveyed. Nonetheless, Vancouver had the highest inventoried occurrence of folk music in the country with 40 presentations. Vancouver was also the place to be for attending children's performances with 663 opportunities, noticeably greater than this survey inventoried in Toronto (283) and Montréal (338).

2.9.2.2 Perceived Product Availability

The majority of Vancouver's general public seems content with the availability of performing arts in their region, with only 20% of those wishing to increase their attendance perceiving a lack of available product in their community (compared with 19% in Toronto and 13% in Montréal).

Vancouver audiences perceive the overall availability of Traditional performing arts products at generally the same frequency as audiences in Toronto; however, ballet, contemporary dance, symphonic music and chamber music are perceived as being somewhat more available in Vancouver.

Within the context of the surveyed network, however, dance, opera, chamber music and particularly theatre would appear to be less frequently available than is perceived. The comparatively high perception of availability for contemporary music was not reflected in the programming inventory of the surveyed distribution network.

Most Popular performing arts in Vancouver, as with the two other urban zones, are perceived by audiences as occurring regularly. It is assumed that a number of variety performances such as jazz and blues, pop and rock, folk, etc. were available via commercial clubs, and not reported in the programming of the surveyed distribution network.

Musicals and children's performances, however, were perceived as having less frequency than was indicated in the product inventory.

2.9.3 PERCEPTION OF FACILITIES

Compared with the 10 other zones, a high proportion of Vancouver's general public (41%), equal only to that of Toronto, finds that the facility only occasionally influences their decision to attend a performance, and one of the highest proportion (70%), after Manitoba (73%) and Toronto (71%), cite this influence as both negative and positive, depending on the facility.

Like the general public, a high proportion of Vancouver audiences (41%), equal only to the Atlantic zone, say the facility only occasionally influences their decision to attend a performance.

Concerning the influence of the facilities' features on the general public's decision to attend a performance, few variations from the national average are observed. One noticeable difference lies in the relative importance of accessibility: residents of Vancouver rate the importance of ease of parking higher (41%) than they rate the

importance of ease of getting to the facility (34%), while Canadians in general rate the two almost equally (39% and 38%). This suggests that among Vancouver residents, parking is more of an issue.

Audiences surveyed in Vancouver, similar to audiences across the country, rate the quality of their facilities relatively low; however, Vancouver facility managers should note that the audiences rated their venues lower than elsewhere in Canada. These include customer service features such as access to seats (28% say "excellent" compared with 32% nationally), cleanliness of the hall (40% versus 47% average) and washrooms (14% versus 19%). Considered an important issue by Vancouver's public, ease of parking is rated as "excellent" by only 21%, compared with the Canadian average of 32%.

Vancouver audiences, who rate ease of parking of the facilities they attended as "average" to "good" rather than "good" to "excellent," reflect the perception of audiences from other major Canadian cities with a population of over one million.

2.9.4 Attending Motivations and Constraints

While Vancouver's general public tend to consider important the same factors influencing the decision to attend a performance as the general public elsewhere in the country, three factors emerge as somewhat more important for Vancouver residents: the ticket price (82% versus 75% for Canada), word of mouth (63% versus 54%) and reviews in the media (49% versus 42%). Price is considered important by slightly more Vancouverites than Torontonians or Montrealers.

Decision-making factors for attending a performance of more importance to Vancouver audiences than to other Canadian audiences include the reputation of the performing group (80% compared with 76%), ticket prices (79% compared with 75%) and reviews in the media (55% compared with 48%). Word of mouth and the desire for an evening out appear somewhat less important to Vancouver audiences than exhibited elsewhere in the country.

Compared with the national average of audiences surveyed, a higher proportion of those in Vancouver state a preference for visiting international companies (19% versus 12%).

Two primary constraints to attendance cited by the Vancouver general public are that ticket prices are too high (59%), the second highest score in Canada after Montréal and equal to Toronto, and not enough time (57%, 5% higher than the national average). Availability does not appear to be a constraint to the majority of Vancouver's general public, with 25% indicating if more performances were available this would increase their attendence, consistent with the general public in Toronto and Montréal.

Thirty-two percent (32%) of Vancouver audiences, however, agree "strongly" or "somewhat" they would attend more if more performances were available, compared with 25% in Toronto and 16% in Montréal. Time appears to be more of a constraint for Vancouver audiences than for audiences elsewhere; almost one-in-two (46%) respondents from the Vancouver audience agree "strongly" or "somewhat" that they do not have enough time to attend more performances. This represents a higher proportion than the national average (37%) and, in fact, is the highest proportion in Canada.

2.9.5 Pricing Issues

Among those who report having attended either a Traditional or Popular performance in the past six months or so, residents of Vancouver paid on average slightly more than other British Columbians, and more than Canadians overall.

Table 7 also reveals that Vancouver residents are prepared to pay a slightly higher price for classical music and pop/rock performances than other British Columbians. However, those residing in Vancouver are significantly less interested than other residents of the province in paying any amount to attend dance and folk music performances. Similarly, albeit to a lesser extent, Vancouverites are more likely to report that they are not interested in paying any amount to attend children's music/theatre and professional sports.

Among Vancouver audiences, respondents continue to report having paid a slightly lower price for tickets to the performing arts than other Canadians.

Vancouver audiences are also prepared to pay more than, or the same as, other British Columbians to attend dance, theatre and classical music performances. Similarly, they are less likely to report that they are not interested in paying any amount for classical music or jazz/blues.

The willingness of respondents in the audience sample to pay more for a single ticket does not differ notably from findings from the national level. However, compared with the other two major centres of Toronto and Montréal, Vancouver performance attenders are over twice as likely to say they would be willing to pay ten dollars more for a single ticket.

Table 7

Vancouver:
TICKET PRICES PAID & PREPARED TO PAY

	VANCOUVER %		B.C OUTSIDE OF VANCOUVER %	
	GP	AUD.	GP	AUD.
AMOUNT PAID FOR LAST PROFESSIONAL PERFORMANCE ATTENDED				
Dollar average	$26	$18	$22	$14
Gift	12	12	8	12
AMOUNT NORMALLY PREPARED TO PAY FOR SINGLE TICKET				
dance:				
Dollar average	$17	$20	$15	$16
Not interested	30	12	21	12
Theatre:				
Dollar average	$21	$20	$18	$19
Not interested	6	2	7	3
Classical music:				
Dollar average	$20	$22	$16	$18
Not interested	28	5	29	8
Jazz/blues:				
Dollar average	$16	$16	$15	$14
Not interested	34	26	32	29
Folk music:				
Dollar average	$14	$14	$12	$13
Not interested	40	29	31	28
Pop/rock:				
Dollar average	$24	$19	$21	$18
Not interested	22	40	26	32
Child music/theatre:				
Dollar average	$9	$12	$8	$10
Not interested	38	39	34	39
Professional sports:				
Dollar average	$19		$20	
Not interested	25		22	

2.10 Toronto

2.10.1 Psychographics, Behaviour and Intention

Table 1 — Psychographic Segments
VALUES TOWARD THE ARTS

	TOR.	NATIONAL AVERAGE
	%	%
Devoted	9	8
Believers	22	**17**
Practitioners	17	**14**
Conditionals	14	**18**
Uncommitted	17	**14**
Uninvolved	12	**17**
Carefree Pop/Rockers	5	6
Tuned Out	6	6

Similar to residents of the other major centres, Torontonians are more likely than residents of smaller centres to be found in the first three segments (48% compared with 39% nationally). Far fewer are found in the ranks of the Uninvolved and Tuned Out. Thus, Toronto residents can be characterized as generally having reasonably positive attitudes toward the arts.

There are a number of significant variations, among the general public, in performance attendance by ethnic background. Those of British/Irish descent (60%) are the most likely to report attendance at Traditional performing arts events during the six months preceding the survey.

Those reporting European (51%), French/French Canadian background (52%), and those with some other background (46%) are generally less likely to report attendance.

When Popular performing arts events are considered, British/Irish (65%), European (65%), and French Canadian (70%) all report similar proportions attending. Among those of non-European background, 56% report attending a Popular performing arts event in the previous six months.

The general public in Toronto is more likely than other Canadians to have attended either Traditional or Popular arts performances in the past six months, whereas those people living in Ontario outside Toronto are less likely than other Canadians to have done the same (see Table 2).

Those Torontonians who have attended a Traditional arts performance in the past six months are also more likely than other Canadians, and other Ontarians, to be interested in attending more of the same.

Those who have attended Popular arts performances in the past six months are about as interested as other Canadians in attending more Popular performances.

Table 2

General Public: Toronto
COMMUNITY SIZE VARIATIONS IN ATTENDANCE PATTERNS & INTEREST IN ATTENDING MORE TRADITIONAL & POPULAR PERFORMING ARTS

	TORONTO %	ONTARIO OUTSIDE OF TORONTO %
ATTENDANCE/TRADITIONAL PERFORMING ARTS		
Attended last six months	54	41
Attended last five years	24	19
Never attended	22	48
INTEREST IN ATTENDING MORE TRADITIONAL PERFORMING ARTS		
Attended last six months:		
Interested	44	31
Content	10	9
Attended last five years:		
Interested	17	17
Content	7	5
Never attended:		
Interested	8	12
Content	14	25
ATTENDANCE/POPULAR PERFORMING ARTS		
Attended last six months	64	52
Attended last five years	21	28
Never attended	16	19
INTEREST IN ATTENDING MORE POPULAR PERFORMING ARTS		
Attended last six months:		
Interested	51	46
Content	13	6
Attended last five years:		
Interested	16	22
Content	5	6
Never attended:		
Interested	6	10
Content	9	10

2.10.2 PRODUCT AVAILABILITY

2.10.2.1 Inventoried Product Availability

Table 3

Pop. (000) 2,289,4	Inventoried Facilities 43	Inventoried Performances 90/09-91/06 3,898
% of Total 11	% of Total 12	% of Total 21

With the largest population of the three urban zones, constituting 11% of the Canadian population over 16 years of age, Toronto offered the greatest number of inventoried professional performances – 3,898 or 21% of the total 18,955 inventoried performances presented nationally.

The number of inventoried active professional facilities in relation to the number of performances is worth noting, as it gives a very high average of 90 presentations for the 43 facilities inventoried during the season. This seems to reflect a number of long-running productions available to Toronto audiences.

4. CAPACITY	
< 400	25
400-800	9
800-1200	3
> 1200	6
Total	43

5. COMMUNITY SIZE	
5,000-10,000	-
10,000-100,000	-
> 100,000	1
Total	1

6. INVENTORIED PERFORMANCES FALL-WINTER-SPRING 1990-91

Type	Performances	% of national
Ballet	77	27%
Contem. dance	74	17%
Dance %	151	21%
Th. comedy	1,323	32%
Th. drama	670	15%
Th. av-garde	223	19%
Theatre %	2,216	23%
Opera %	69	25%
Symph. music	61	12%
Symph. "pop"	3	2%
Chamber mus.	70	13%
Contem. class.	45	34%
Choral music	16	9%
Classical %	195	13%
Traditional %	2,631	22%
Pop/rock	12	2%
Comedy	197	32%
Folk music	6	2%
Musicals	702	42%
Jazz/blues	39	15%
Count. & west.	0	0%
Popular %	956	28%
Child prod.	283	9%
Ethnic/herit.	28	15%
Other %	311	9%

The 43 active professional facilities inventoried in Toronto were relatively well distributed among the different capacities. As in Montréal and Vancouver, small facilities of under 400 seats are the majority in Toronto, a capacity usually suited to experimental theatre and dance, children's shows and variety performances that require a more intimate ambience.

Over a third of the inventoried facilities were in the 400-1,200 seat range. This capacity is often multidisciplinary and suitable for mid-sized productions like popular theatre, variety, chamber music, etc. Toronto also had 6 inventoried facilities over of 1,200, the capacity usually associated with presentations of opera, ballet, symphony concerts and musicals.

To the extent of this survey's inventory, Torontonians had 2,631 professional performances in the *Traditional performing arts* category, representing 67% of the total inventoried performances in Toronto. Close to 85% of these were theatre presentations, with theatre comedy represented in the inventory twice as often as theatre drama, the highest ratio of any zone.

The dance performances inventoried in Toronto were almost equally distributed between ballet and contemporary dance. The 69 opera performances, though not conclusively representative, would indicate that Toronto was the place to be for lovers of this genre; however, this survey's inventory of classical music presentations in general seems low for this urban centre.

As inventoried, musicals in Toronto were by far the most frequently presented *Popular performing art* form, offering audiences 702 occasions to attend. The number of inventoried comedy performances in this distribution network was unusual as well, with the 197 presentations surpassed only in Québec.

2.10.2.2 Perceived Product Availability

The majority of Toronto's general public believe they are well served by the availability of performing arts in their city. Nineteen percent (19%) of those who were interested in improving their attendance perceived a lack of product availability, similar to findings in Vancouver (20%), and somewhat greater than Montréal (13%). While the general public's intention to attend more performances, given greater availability, was fairly consistent in all three cities, interestingly, Toronto is the only city where the audience and the public are in agreement. Here, one quarter (25%) of both groups state that increased attendance would result from increased opportunities, compared with the national average of 37%.

Audience members believe that theatre drama is available with a slightly greater frequency than theatre comedy. The inventoried performances, however, while not conclusive, would seem to indicate the reverse. Musicals are also seen to offer frequent viewing opportunities. This perception would appear to be substantiated by the strong presence of musical performances inventoried in the Toronto.

Avant-garde theatre is perceived by Toronto audiences as less frequently available than symphonic music; however, the inventory would suggest that avant-garde theatre is perhaps more available than is generally perceived. While classical music overall is perceived to be at least occasionally available, contemporary classical music is perceived to have a relatively high rate of frequency, and, according to the inventoried availability in this network, one third of the total performances of this genre occurred in Toronto.

Toronto audiences perceive dance and opera to be relatively available as well and this is reflected in the equally present inventoried ballet and contemporary dance performances and the inventoried availability of opera. Comedy is seen as readily accessible and this perception would appear to be supported by the inventory of available product, which was high in Toronto. It is assumed that a large number of variety performances such as jazz and blues, pop and rock, folk, etc. were available via commercial clubs, and not reported in the programming of the surveyed distribution network.

2.10.3 PERCEPTION OF FACILITIES

A high proportion of Toronto's general public (41%), equal only to that of Vancouver, finds that the facility only occasionally influences their decision to attend a performance. One of the greatest majorities (71%), after Manitoba (73%), indicate that this influence can be both negative and positive, depending on the facility. Torontonians also show the lowest proportion of respondents (6%), equal only to Saskatchwan, claiming that the facility negatively influences their decision to attend.

The population of Toronto rates most facility features similarly to the Canadian general public. Differences do emerge, however, in terms of seating comfort, rated as "very" important by a majority of the population (55% compared with 49% of Canadians), and the quality of the house program, already one of the least important facility features in general, which is of even less importance to Torontonians (rated 9% under the national average).

The frequency and type of influence that the facility exerts on Toronto audiences' decision to attend a performance is similar to that of Canadian audiences overall. The only significant differences in the influence of the facility lie between Toronto audiences and the general public. Audiences seem to be more negatively influenced by the facilities than the general public. Furthermore, audiences in Toronto seem less likely than the general public to be ambivalent about the type of influence the facility has on their decision to attend a performance

Toronto audiences, in rating the quality of features of the facilities, appear to find accessibility (ease of getting to the facility and ease of parking) something of a problem, rating both features as "excellent" 6% less than national audiences. A slightly lower rating (35%, compared with 39% nationally) is given the quality of sound, while view of the stage (43% say excellent) is given the highest evaluation by 5% of the three urban zones.

There is little variation from national audience averages in evaluating customer service elements, with one exception: Toronto audiences are more likely, by a slight margin, than audiences in either Vancouver or Montréal to rate the beverage services available as "excellent."

2.10.4 ATTENDING MOTIVATIONS AND CONSTRAINTS

Compared with Montréal, the general public from Toronto are less likely to identify the cost of tickets (59% versus 64%) and more likely to identify lack of time (58%, 52%) as constraints to attendance. Torontonians also are the least concerned by performance availability (32% compared with 36% in Vancouver and 34% in Montréal).

The Toronto general public consider several factors that influence decision-making as being more important than Canadians overall. Two performance-related factors rate highly – the company/group of performers (58% versus 52% nationally and greatest of the three urban zones) and familiarity with the piece being performed (54% versus 48% overall, greatest of the city zones). The ticket price is rated five points above the average, although it is slightly below Vancouver as an important factor.

While Torontonians show a slight tendency to favour international performers (20%), over half (57%) indicate no preference, the highest result in Canada and equal to Vancouver. It is worth noting that Torontonians show the least interest of all zones for visiting national companies with only 4% indicating this preference, compared with a national average of 9%. The fact that a substantial number of national companies reside in Toronto could explain this low rating. The preference for local companies by Torontonians is slightly less than the national average.

Attitudes of Toronto audiences vary little from national figures with respect to factors influencing the decision to attend. The desire for an evening out is cited as important by a slightly smaller proportion of respondents (45% versus 51%). Furthermore, fewer say familiarity with the performance is important (45%, compared with 53%). Price of tickets, which is identified as a constraint by six-in-ten Torontonians, is a concern as well for Toronto audiences. As many as 77% say it is an important factor of decision, just over the national average.

Only 25% of Toronto audiences, compared with 37% for Canada, agree that they would attend more if more performances were offered. Among the three urban zones, Montréal has a smaller proportion who agree with this statement (16%) and Vancouver has a greater proportion (32%).

2.10.5 Pricing Issues

The Toronto general public, on average, paid notably more for their last performance ticket than did other Canadians ($31 versus $23). As well, they are generally willing to pay more than other Canadians for future performances, especially for theatre and classical music.

The proportion of people in Toronto interested in attending future performances generally matches the levels found elsewhere in Canada, although Torontonians are more interested in attending jazz/blues concerts and less interested in attending children's music/theatre.

The amount paid by Toronto audiences for the last performance was somewhat more than other Canadian audiences paid ($25 versus $22). However, they are willing to pay either as much, or more than other Canadians for future performances. They are willing to pay notably more for dance, theatre and classical music performances, while willing to pay around the national average for other performances.

Interest in attending future performances remains at the national level for most of the categories, except folk music and pop/rock, where Torontonians are less inclined to attend.

The attitudes of those in the audience sample from Toronto do not differ notably from the audience sample overall. Roughly one-in-ten (12%) say they would not be willing to pay any amount more for a single ticket, while the populace (45%) say they would pay either two or four dollars more.

Table 7

Toronto:
TICKET PRICES PAID & PREPARED TO PAY

	TORONTO %		ONTARIO OUTSIDE OF TORONTO %	
	GP	AUD.	GP	AUD.
AMOUNT PAID FOR LAST PROFESSIONAL PERFORMANCE ATTENDED				
Dollar average	$31	$25	$26	$22
Gift	15	2	11	2
AMOUNT NORMALLY PREPARED TO PAY FOR SINGLE TICKET				
Dance:				
Dollar average	$20	$24	$20	$21
Not interested	30	11	32	15
Theatre:				
Dollar average	$29	$27	$24	$24
Not interested	6	2	11	3
Classical music:				
Dollar average	$23	$27	$20	$22
Not interested	30	6	31	8
Jazz/blues:				
Dollar average	$17	$18	$17	$18
Not interested	28	30	38	32
Folk music:				
Dollar average	$15	$16	$15	$16
Not interested	38	37	39	32
Pop/rock:				
Dollar average	$24	$21	$27	$21
Not interested	20	40	25	38
Child music/theatre:				
Dollar average	$12	$14	$11	$13
Not interested	40	41	39	42
Professional sports:				
Dollar average	$21		$20	
Not interested	20		23	

2.11 Montréal

2.11.1 PSYCHOGRAPHICS, BEHAVIOUR AND INTENTION

Table 1 — Psychographic Segments

VALUES TOWARD THE ARTS

	MTL	NATIONAL AVERAGE
Devoted	15	8
Believers	16	17
Practitioners	11	14
Conditionals	20	18
Uncommitted	11	14
Uninvolved	17	17
Carefree Pop/Rockers	6	6
Tuned Out	3	6

Montréal has the highest proportion of the Devoted segment (the segment with generally the most positive attitudes toward the arts) at 15%, well above the national average of 8%. There is also a somewhat larger proportion of the Conditionals, those whose reported attendance behaviour is well below that of the first two segments, greater than both Toronto (14%) and Vancouver (12%). Montrealers are somewhat underrepresented among the Uncommitted (11% compared with 14% nationally), the segment which, except for the Tuned Out, has the least frequently reported attendance to the performing arts. Overall, these results suggest that Montrealers tend to be somewhat more oriented toward Traditional performing arts than is found elsewhere in the country.

Variations in reported attendance, on the part of the general public, at Traditional and Popular types of performances are limited to the Traditional performing arts.

Francophones are somewhat more likely than Anglophones to report that they attended a Traditional performing arts event in the previous six months (58% versus 49%). No differences exist by language in reported attendance at Popular performing arts performances.

Within Québec, arts attendance patterns are relatively uniform. While Montrealers are slightly more likely than Québecers residing outside the city to state that they have attended a Traditional arts performance in the last six months (57% versus 51%), differences in longer term Traditional arts attendance and attendance of the Popular performing arts are negligible.

When compared with the national findings, however, significant differences do become evident. Among Montrealers, 57% state that they have attended a Traditional arts performance in the last six months compared with only 46% of the total Canadian population. In addition, life-time attendance of Traditional arts is significantly higher among Montrealers. Less than one quarter (23%) of Montrealers report never having attended a Traditional arts performance. In contrast, almost one third (32%) of Canadians have never attended a Traditional arts performance.

Table 2

General Public: Montréal
COMMUNITY SIZE VARIATIONS IN ATTENDANCE PATTERNS AND INTEREST IN ATTENDING MORE TRADITIONAL & POPULAR PERFORMING ARTS

	MONTRÉAL	QUÉBEC LESS MONTRÉAL
	%	%
ATTENDANCE/TRADITIONAL PERFORMING ARTS		
Attended last six months	57	51
Attended last five years	20	22
Never attended	23	26
INTEREST IN ATTENDING MORE TRADITIONAL PERFORMING ARTS		
Attended last six months:		
Interested	46	47
Content	11	8
Attended last five years:		
Interested	20	18
Content	5	3
Never attended:		
Interested	9	10
Content	9	13
ATTENDANCE/POPULAR PERFORMING ARTS		
Attended last six months	56	55
Attended last five years	25	22
Never attended	19	23
INTEREST IN ATTENDING MORE POPULAR PERFORMING ARTS		
Attended last six months:		
Interested	47	41
Content	9	10
Attended last five years:		
Interested	14	15
Content	6	7
Never attended:		
Interested	11	9
Content	12	17

Not surprisingly, interest in attending more arts performances, both Traditional and popular, increases dramatically with frequency of past attendance. For example, among Montrealers and other Québecers, those who have attended a performance in the last six months are more than twice as likely to state that they are interested in attending more performances than are those who have attended a performance in the last five years, who in turn are more likely to be interested in attending a performance than those who have never done so.

Regionally, while levels of interest in attending more Traditional arts performances are relatively uniform among Montrealers, Québecers outside of Montréal and Canadians as a whole, there are some significant differences between these three groups in terms of their level of interest in attending more Popular arts performances. Montrealers who have attended a Popular arts performance in the last six months are the most likely to say that they are interested in attending more (47%), followed by other Québecers (41%) and then Canadians generally (37%). Again, more recent exposure appears to generate a higher level of interest.

2.11.2 Product Availability

2.11.2.1 Inventoried Product Availability

Table 3

Pop. (000) 1,537,6	Inventoried Facilities 59	Inventoried Performances 90/09-91/06 3,402
% of Total 7	% of Total 17	% of Total 18

Montrealers, representing 7% of the Canadian population, were offered 3,402 inventoried professional performances during the surveyed Fall-Winter-Spring season which accounted for 18% the 18,955 inventoried performances across Canada.

There was a total of 59 inventoried active professional facilities in Montréal, the greatest number, within the context of this survey, recorded of any zone.

4. CAPACITY	
< 400	29
400-800	13
800-1200	9
> 1200	8
Total	59

5. COMMUNITY SIZE	
5,000-10,000	-
10,000-100,000	-
> 100,000	1
Total	1

6. INVENTORIED PERFORMANCES FALL-WINTER-SPRING 1990-91

Type	Performances	% of national
Ballet	33	12%
Contem. dance	89	21%
Dance %	122	17%
Th. comedy	344	8%
Th. drama	1104	25%
Th. av-garde	612	52%
Theatre %	2,060	21%
Opera %	**62**	**23%**
Symph. music	77	15%
Symph. "pop"	8	5%
Chamber mus.	159	28%
Contem. class.	50	38%
Choral music	18	11%
Classical %	**312**	**20%**
Traditional %	**2,556**	**21%**
Pop/rock	129	21%
Comedy	96	16%
Folk music	9	4%
Musicals	187	11%
Jazz/blues	41	16%
Count. & west.	2	3%
Popular %	**464**	**13%**
Child prod.	338	11%
Ethnic/herit.	44	23%
Other %	**382**	**12%**

More than a third of Montréal's inventoried facilities seated between 400-1,200 people. Facilities in this range are usually multidisciplinary and can offer anything from traditional theatre and chamber music concerts to touring productions and variety performances. There were also a substantial number (29) of smaller venues in Montréal, whose capacity is suitable for productions, such as children's performances or avant-garde theatre, where an intimate atmosphere is more appropriate. Montréal had 8 halls seating more than 1,200, the size best suited to the technical and economic requirements of large scale productions such as Popular performing arts, ballet, opera and symphonic music.

Three quarters of the inventoried performances offered to Montrealers were *Traditional performing arts,* the greatest percentage of the three urban zones.

Of the total number of opportunities for attending dance performances, contemporary dance, as indicated by this inventory, was offered to Montrealers nearly three times as often as ballet.

While theatregoers appeared to be well served, as indicated by the inventoried attendance opportunities, the distribution of types, with avant-garde theatre representing 30% of inventoried theatre presentations, is worth noting.

Both opera and classical music offered audiences numerous inventoried opportunities, in particular those provided by chamber music with 159 occasions. Within the context of this survey, the inventory for contemporary classical music, which has perhaps a smaller market, suggests a relatively strong presence in Montréal. While not conclusively representative, the inventoried number of occasions to attend sym

phonic pop concerts seems somewhat limited.

Of the *Popular performing arts*, musicals offered the most inventoried opportunities with a total of 187 presentations. Pop/rock and pop music (129) and comedy (96) offered a higher than expected viewing opportunity, considering the underrepresentation of these types of performances in the inventoried distribution network. Residents of Montréal were also offered, in the surveyed network at any rate, a comparatively large number of ethnic performances (44).

2.11.2.2 Perceived Product Availability

Of the three urban zones, the general public in Montréal indicating an interest in attending the performing arts more frequently are the least likely to perceive the lack of performances in community (13%). They are also the least likely to indicate they would increase their attendance given greater availability (23%). In light of greater availability, Montréal audiences (16%) would be less likely than either Toronto audiences (25%) or Vancouver audiences (32%) to indicate that they would in fact attend more.

While it is presumed that major centres will present all product types with at least occasionally, Montrealers (given the low response to greater product availability on intended behaviour) perceive the following types of performances to occur with significantly less frequency in their community than either Torontonians or Vancouverites: ballet, contemporary dance, musicals, chamber and classical music soloists, opera and choral music. Relative to this survey's product inventory, it would appear that ballet was somewhat underrepresented, compared with Toronto. Contemporary dance, on the other hand, as well as chamber music concerts and classical soloists, would appear to occur with more frequency than Montrealers perceive. Similarly, opera performances (62), contemporary classical (50) and symphonic music (77) would also appear to have an actual availability beyond what is perceived by Montréal audiences.

In the Popular performing arts, musicals are seen by Montrealers as presenting the least frequent opportunities after New Brunswick and Québec audiences, and while the lack does not seem to be quite as drastic as perceived, the inventoried opportunities represented the lowest availability of the three city zones. Other variety products are perceived as either equally or somewhat less available in Montréal than in Toronto or Vancouver. While rock and pop inventoried availability had a very strong presence in this network, actual availability of most Popular performing arts, however, is dependent on commercial clubs outside of the inventoried distribution network.

2.11.3 Perceptions of Facilities

Similar to other zones, a significant proportion of the general population of Montréal has been frequently (22%) or occasionally (36%) influenced by the facility in its decision to attend a performance. While the majority of Montréal residents say that this influence can be both positive and negative, this city zone has the highest proportion of residents in the country claiming that this influence is mostly negative (13% compared with 9% for average).

For Montréal's general public, the relative importance of each facility feature is similar to the national rating. One exception, however, is that Montrealers are more likely to find that the view of the stage is a more important factor than the quality of sound. Residents of this city indicate that almost every feature is of slightly lower importance in their decision than the residents of other zones. This is particularly true with respect to the comfort of seating (35%), which rated 14 points below averag;, the cleanliness of the hall (34%), rated nine points below average; and the washrooms (30%), rated eight points below average.

While, as in the rest of the country, a larger proportion of audiences indicate that the facility only "occasionally" influences their decision to attend, it is interesting to note that a record proportion of Montrealers say that this influence can be positive and negative, depending on the facility. Montréal also has a record proportion of residents (34%) that say they are only rarely influenced in their decision by the facility.

For most of the facility features, the proportion of Montréal audiences rating their quality as "excellent" is low. Montréal audiences are slightly less satisfied than the audiences from other zones with most facility features, especially the comfort of seating (18%, rated 5% less than the national average).

2.11.4 Attending Motivations and Constraints

When comparing the motivations and constraints to increased performance attendance, there are significant variations between Montrealers and the rest of Canada.

Montrealers give the highest score of all zones (64%) to "ticket price too high" as a reason not to attend, 11 points above the average and five points higher than Vancouver and Toronto. "Not enough time" (55%) is cited as the second main constraint, slightly above the national average (52%), and just beyond Vancouver (57%) and Toronto (58%). Montrealers attribute a low degree of importance to product availability (34%), access to facilities (25%) and no interest in performing arts (34%). The issues of no interest and access are the most striking differences between Montréal and the two other major cities.

Similar questions asked of the general public who expressed interest in attending more frequently confirms that money (63%) and time (47%) are major constraints, again above average and first, or practically first, of all zones. Facility accessibility and availability of performances are low constraints, in fact, the lowest of all zones, and significantly lower than Vancouver and Toronto.

The rating of factors influencing the decisions of Montréal's general public to attend a performance do not vary significantly from the national average. Factors related to the product, however, show that lower than average importance is attributed to the company/group of performers (46% versus 52% nationally), the level of familiarity with performance (39% versus 48% nationally), or reputation of company/group (59% versus 65% nationally). The facility where the production is presented is somewhat less important (50% compared with 55%). The desire for an evening out, however, is higher than the average (66% compared with 61%), and in fact, with Québec, among the highest of all zones.

More Montrealers (55%) than residents of any other zone indicate that being emotionally touched or moved is a very important factor to attend a performance. The general public in Montréal also indicates a slight preference for local performances compared with the general public of other large cities.

Audiences in Montréal are more likely to indicate that the piece being performed is "very" important factor in deciding to attend a performance (the highest score, 95% compared with the national average of 90%). The second most important factor is the specific performers (74%, second only to Québec at 78%). Price paid is seen as an important factor by 72% of audiences, slightly less than the average. A smaller proportion of Montréal audiences rate several factors associated with the decision-making process as important. These include word of mouth (39% compared with 68% nationally), reviews in the media (37% versus 48%), reputation of the performing group (62% versus 75%) and the facility (43% versus 6%).

In all, 25% of audiences agree "strongly" or "somewhat" that they do not have enough time to attend more performances compared with the national average of 37%. This result while higher than that of Québec audiences (20%), is remarkably lower than among the audiences in Toronto (44%) and Vancouver (46%). Furthermore, these results are significantly lower for Montréal audiences than for the general public.

Availability does not seem to be a constraint for Montréal audiences, as only 16% agree "strongly" or "somewhat"– the lowest score of all zones – that they would attend more performances if more were available, less than half the national average of 37%.

2.11.5 Pricing Issues

The average dollar amount paid for a ticket to a professional arts performance by Montrealers is slightly higher than the average price paid by other Québecers ($24 versus $17). In addition, Montrealers are almost twice as likely to have received a ticket as a gift than are those who live outside Montréal.

Overall (with the exception of jazz and blues performances), it appears that Montrealers are prepared to pay marginally more for tickets to all types of events examined than are other Québecers.

It is interesting to note that among Montrealers and other Québecers, the average dollar value that they state they are willing to spend for a ticket to the various categories of performances examined are less than the dollar average that they report paying for the last performance they attended. In the case of Montrealers, this difference is significant. While Montrealers report having paid an average of $24 for the last performance they attended, the highest ticket price that they say they are normally prepared to pay is $17 for a theatre performance.

As mentioned above, Montrealers are prepared to pay the most for a ticket to a theatre performance ($15). Both Montrealers and other Québecers also indicate that they would pay the least for a ticket to a folk music performance ($6 and $5 respectively).

Differences in terms of the amount that Montrealers versus other Québecers and even Canadians as a whole are prepared to pay for a ticket for the same types of arts events are limited.

There are, however, some slight differences between these three groups in terms of the level of interest in attending some of the arts performances examined. For example, Montréal residents (26% "not interested") are less likely than either other Québecers (35%) or Canadians generally (32%) to state that they are not interested in attending a performance of classical music no matter what the ticket price. The same is true for jazz and blues performances. Only 30% of Montrealers state that they are categorically not interested in attending this type of performance compared with 37% of other Québecers.

The reverse is true for folk music performances, 45% of Montrealers state that they would not be prepared to pay anything for a ticket for this type of event, compared with 38% of Canadians generally.

While the average Montrealer paid seven dollars more for a ticket to the last professional arts performance he or she attended than did the average non-Montréal Québec resident ($24 versus $17), the discrepancy between ticket prices paid by audience members in these two regions is significantly lower ($25 versus $22).

There are no significant differences between the amount that audiences in Montréal, the rest of Québec and Canada are prepared to pay for tickets to the various types of performances examined. The only significant differences evident between audiences in Montréal, the rest of Québec and Canada are in the number of respondents who are not interested in attending jazz and blues and folk music performances at any cost. Audiences in Montréal are significantly more likely than Canadian audiences generally to state that they are not interested in folk music (47% not interested versus 31%) and significantly less likely than other Québecers to be not interested in jazz and blues (26% not interested versus 34%).

Among residents of Montréal in the audience sample, willingness to pay more for a single ticket to a performance closely resembles national findings. Compared with elsewhere in the province, residents of Montréal are more likely than those in other larger communities of over 100,000 people, to say they would pay at least an additional eight dollars (22% compared with 14%).

Table 7

Montréal:
TICKET PRICES PAID & PREPARED TO PAY

	MONTRÉAL %		QUÉBEC LESS MONTRÉAL %	
	GP	AUD.	GP	AUD.
AMOUNT PAID FOR LAST PROFESSIONAL PERFORMANCE ATTENDED				
Dollar average	$24	$25	$17	$22
Gift	14	5	8	1
AMOUNT NORMALLY PREPARED TO PAY FOR SINGLE TICKET				
Dance:				
Dollar average	$15	$18	$11	$15
Not interested	26	13	26	19
Theatre:				
Dollar average	$18	$20	$16	$17
Not interested	5	3	4	4
Classical music:				
Dollar average	$19	$20	$15	$18
Not interested	26	9	35	16
Jazz/blues:				
Dollar average	$15	$15	$12	$15
Not interested	30	28	37	34
Folk music:				
Dollar average	$12	$13	$10	$13
Not interested	45	49	43	43
Pop/rock:				
Dollar average	$19	$18	$18	$18
Not interested	19	33	19	29
Child music/theatre:				
Dollar average	$10	$11	$10	$9
Not interested	32	38	30	32
Professional sports:				
Dollar average	$16		$17	
Not interested	23		26	

Chapter 4

Performing Arts Products in Canada

1. OVERVIEW

1.1 Attendance Patterns

1.1.1 TRADITIONAL PERFORMANCES

The substantial proportion of the general population (46%) who were reported in Chapter 2 as having attended a Traditional type performance in the last six months conceals the fact that the majority of Canadians report that they have never attended most types of Traditional performing arts (Table 4.1). For most types of performances, upwards of three quarters or more of the population report never having attended. The major exception is theatre where substantial pluralities report attending; in fact, 47% and 40% respectively, report having seen a theatre-comedy and theatre-drama performance.

While the limited history of attendance is clearly a challenge, many of those who report attending in the last five years remain part of the current audience. Table 4.1 indicates that for most types of Traditional performing arts products, a half or more of those who report attendance in the last five years say they attended a performance in the last six months. The one significant exception is ballet where more say they have attended in the last five years than say the last six months.

Although current attendance at most types of Traditional performing arts is clearly limited, the exception is theatre. In all, as Table 4.1 makes clear, a quarter of the population report having attended either a comedy (27%) or a drama (24%) in the last six months. Few (5%), though, report attending modern/experimental theatre.

Other performance types are also close to the 5% mark in terms of reported attendance over the previous six months, although symphonic and choral music goers appear to be more numerous, with respectively 12% and 10% of Canadians reporting attendance. While general public attendance for many types of Traditional performing arts may be limited, the results from the audience survey suggests that audiences are loyal. The audience attendance figures shown in Table 4.1 indicate that the majority of those attending a traditional performance are regular attenders, at least in the sense that, in addition to the performance attended in the season surveyed, they report attendance in the last complete season.[1] The exceptions appear to be contemporary classical music, experimental theatre and symphonic "pops", where one third or more report non attendance at each performance type last season. Possibly, limited availability of these products accounts for this pattern.

At the other end of the scale – ballet, drama, and symphonic music audiences all appear extremely loyal, with fewer than 15% of the audience interviewed at each performance type reporting non attendance last season. These same three performance types also have the most frequent attenders among the Traditional performing arts. In all, a third of those in a ballet audience, 40% of those in a drama audience, and nearly two thirds of those in a symphonic music audience report attending at least three performances of these types in the last complete season.

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1 The last complete season for the audience survey was defined for respondents in terms of a specific period. Thus, for Wave 1 respondents, it was June 1990 to August 1990; for Wave 2, it was September 1990 to December 1990; and for Wave 3, it was January 1991 to May 1991.

Table 4.1
AUDIENCE AND GENERAL PUBLIC: ATTENDANCE PATTERNS BY TYPE OF PERFORMANCE

	AUDIENCE SURVEYED ATTENDANCE LAST SEASON*			GENERAL PUBLIC		
	ATTENDED 3/4 TIMES	ATTENDED 1/2 TIMES	DID NOT ATTEND	ATTENDED IN LAST 6 MONTHS	ATTENDED IN LAST 5 YEARS	NEVER ATTENDED
TRADITIONAL						
Ballet	34	58	8	6	11	83
Cont. Dance	20	58	22	6	8	86
Theatre - drama	40	46	14	24	16	60
Theatre - comedy	26	53	21	27	20	53
Theatre - A.G.	18	49	32	5	5	90
Symphonic music	64	24	12	12	10	78
Symphonic "pops"	43	24	33	8	9	83
Contemporary classical	24	35	41	-	-	-
Chamber and soloist	38	39	23	6	5	90
Opera	36	38	26	5	5	90
Choral	24	49	27	10	7	84
POPULAR						
Pop/Rock	18	49	33	27	16	58
Jazz/Blues	28	42	30	13	8	79
Folk	18	36	46	8	8	84
Count. & West.	28	38	34	15	10	75
Musicals	14	57	29	19	15	65
Stand-up comedy	15	63	22	19	15	66
OTHER						
Children's	23	45	32	16	9	75
Ethnic/Heritage	26	51	23	13	11	76

* Among audiences, only attendance history for the performance type at which respondents were surveyed is shown. Thus, for example, only those surveyed at a ballet performance are included in the ballet category.

1.1.2 POPULAR AND OTHER PERFORMANCES

Just as there are great variations in Traditional performing arts attendance, so too are there in the Popular category. In all cases, majorities of the population report never attending performances of individual types, though, as noted in Chapter 2, 55% report having attended at least one Popular performance in the last six months.

The most frequently attended performance types are pop/rock, musicals and comedy, with 43%, 34% and 34%, respectively, of the population reporting ever attending a performance. At the other end of the scale, fewer than a quarter of the population report attending jazz/blues, folk, country, children's and ethnic/heritage performances.

Popular performing arts audiences appear to be regulars at each performance type. In all cases, fewer than one third report that they did not attend a similar type of performance in the last complete season.

1.2 Audience Across Performance Type Attendance

Audiences are not "monogamous." While they are most loyal to the type of performance at which they were surveyed, they clearly believe in diversity of performance experience. This much is clear from Table 4.2, which shows the reported types attended for each type of audience surveyed.[1]

Taking the three major disciplines of Traditional performances - dance, theatre, and music - it is clear that many in each type also reach well beyond that discipline. Clearly, the idea that audiences generally attend only performances of a single discipline is dispelled by the results shown in Table 4.2.

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1 Each category of performance type shown in the left hand margin of Table 4.2 only contains those individuals surveyed at the specified performance type. Thus the responses of those captured at ballet performances are only shown in the ballet category on the left-hand margin. This convention is followed whenever the audience is analyzed by type of performance attended.

Responses for each performance type in Table 2 show their responses to a question which asked each type which other performances they had attended in the last complete season. Returning to the ballet example, this means that among the ballet audience 41% report also attending a Contemporary dance performance in the last complete season, and 56% report attending a drama performance.

Table 4.2

AUDIENCE: TYPES OF PERFORMANCES ATTENDED BY ALL AUDIENCE TYPES

TRADITIONAL PERFORMING ARTS
PERCENT ATTENDED IN LAST COMPLETE SEASON

AUDIENCE SURVEYED	Ballet	Cont. Dance	Theatre-Drama	Theatre-Comedy	Theatre-A.G.	Symph. Music	Symph. Pops	Cont. Class	Chamber/ Solo	Opera	Choral
	%	%	%	%	%	%	%	%	%	%	%
TRADITIONAL											
Ballet	**92**	41	56	44	15	43	19	18	28	31	28
Cont. dance	53	**78**	65	48	24	38	15	18	24	20	27
Theatre-drama	26	21	**86**	68	26	36	20	18	22	20	29
Theatre-comedy	24	23	79	**79**	29	31	13	17	20	20	22
Theatre-A.G.	22	37	77	62	**68**	31	13	13	16	21	19
Symphonic Music	46	17	57	47	17	**88**	35	37	48	35	51
Symphonic "pops"	34	18	54	51	11	72	**67**	36	35	26	44
Cont. Classical	34	31	63	49	29	67	32	**59**	54	34	51
Chamber/ Soloists	38	25	56	44	16	71	21	42	**77**	34	50
Opera	38	22	59	49	21	61	21	28	46	**74**	44
Choral	32	20	56	40	16	68	22	33	55	41	**73**
POPULAR											
Pop/Rock	25	27	50	47	14	27	22	17	18	14	27
Jazz	28	29	60	55	17	45	23	30	37	16	35
Folk	17	14	56	51	13	27	16	16	19	16	31
Count. & West.	20	13	40	42	6	14	14	7	9	7	12
Musicals	23	19	68	61	14	31	17	16	19	19	28
Stand-up comedy	17	21	37	63	13	18	14	8	9	10	40
OTHER											
Children's	18	25	58	54	18	31	14	14	18	21	26
Ethnic/ Heritage	31	31	54	41	21	34	17	27	32	22	34

Table 4.2 (cont.)

AUDIENCE: TYPES OF PERFORMANCES ATTENDED BY ALL AUDIENCE TYPES

	POPULAR PERFORMING ARTS PERCENT ATTENDED IN LAST COMPLETE SEASON						OTHER	
	Pop/rock	Jazz /blues	Folk	C & W	Musicals	Stand-up comedy	Children's	Ethnic/ heritage
	%	%	%	%	%	%	%	%
AUDIENCE SURVEYED								
TRADITIONAL								
Ballet	25	19	13	8	45	26	28	26
Cont. dance	34	31	17	11	34	30	25	31
Theatre-drama	26	20	14	12	47	36	19	21
Theatre-comedy	30	24	21	15	45	40	29	23
Theatre-A.G.	45	36	15	10	32	40	24	22
Symphonic music	14	26	13	6	45	26	17	23
Symphonic "pops"	15	15	13	10	48	31	15	21
Cont. classical	31	43	20	10	45	28	22	34
Chamber/ soloists	16	23	15	6	40	20	17	23
Opera	13	15	10	5	52	25	18	17
Choral	15	19	16	9	49	23	18	28
POPULAR								
Pop/Rock	**67**	30	28	20	39	39	24	27
Jazz	30	**70**	30	19	45	26	25	36
Folk	33	29	**54**	31	45	32	26	31
Count. & West.	30	16	27	**66**	39	30	19	26
Musicals	28	20	17	14	**71**	37	23	23
Stand-up comedy	40	28	15	13	39	**78**	21	21
OTHER								
Children's	25	23	19	16	39	29	**68**	32
Ethnic/ Heritage	34	37	48	24	37	31	31	**77**

Perhaps not surprisingly, given the attendance patterns discussed in Table 4.1, almost all audience types report heavy attendance at theatrical performances. In fact, in excess of half of dance and music audiences report attendance at a theatrical performance of some type, typically drama or comedy.

Across-type attendance at theatrical performances is, however, not restricted to Traditional audiences. Majorities of audiences at most Popular and other type perfor-

mances report theatrical attendance. The only audience type with less than half reporting attendance at a theatre are country and western audiences. Even among pop/rock audiences half report attending a drama at a theatre.

A second point of significance is that audiences are not necessarily most likely to report attendance at a performance type related to the one at which they were surveyed. This is certainly true for the audiences of mainstream performances of ballet and symphonic music. Both have audiences that display as much, if not more, attendance at other types than those related to their own discipline. Thus, for ballet audiences, as many say they attend symphonic music as say they attend contemporary dance. And more say they attend theatre. Similarly, those attending symphonic performances are as likely to report attending ballet as other types of traditional music performance of some traditional type of product. Again, more say they attend theatre than other music performances.

A third point is the existence, to some slight extent, of an avant-garde audience. There is some tendency for audiences at contemporary dance, experimental theatre, and contemporary classical music performances to have higher attendance patterns at other avant-garde performance types than at traditional types. This, though, is not a strong relationship and to describe and define an avant-garde audience would perhaps be stretching the point.

What is clear, however, is that ballet audiences, theatre audiences, and "classical" music audiences are the main audiences for each disciplines' avant-garde. For example, 41% of members of the ballet audience report attending a contemporary dance performance in the last complete season. Similarly, each discipline also draws a substantial proportion of its avant-garde audience to more performances of mainstream types of products .

In addition to attending a wide variety of traditional type performance, traditional audiences display a wide ranging eclecticism by also attending performances of popular types of products on a regular basis. In particular, substantial minorities report attending performances of musicals, stand-up comedy and pop/rock during the last complete season.

There are, though, some broad trends apparent in the data displayed in Table 4.2.

First, certain audiences of certain traditional types show a clear preference for specific types of Popular performances and a lack of interest in others. For example, audiences of traditional types of music are more likely to report attendance at jazz/blues performances than pop/rock types performances. Theatre audiences are, on the other hand, more likely to report attendance at pop/rock performances than jazz/blues.

Second, some performance types have few adherents outside of their own group of fans. This is especially the case with folk and country audiences. Few in the audiences of Traditional types of performing arts products report attendance at either of these performance types.

Third, the avant-garde audience for the corresponding Traditional performance type report quite high attendance at pop/rock, but also at jazz/blues performances.

Fourth, opera audience members are the most likely of all groups to report attendance at a musical in the last complete season, however, the interest is not reciprocated.

Audiences at musicals are not especially likely to report attendance at an opera performance.

Not unexpectedly, audiences at a type of Popular performance are much more likely than their Traditional counterparts to report attendance at other types of Popular performances and they are just as eclectic in this regard as audiences of the traditional performing arts. For example, better than three in ten jazz audiences members report attending rock/pop, folk, musical, stand-up comedy or ethnic/heritage performances.

Finally, the cross-over audience from Traditional to Popular types and vice-versa, is quite strong both ways. Proportionally, as many Traditional audiences attend performances of popular performing arts products as the other way around. This suggests that the distinction between Traditional and Popular performing arts as well as between each type of product or discipline may be more of a reflection of self definition by performing arts groups and art funding bodies themselves, rather than a concept that audiences adhere to.

1.3 Preferences for Future Attendance

1.3.1 TRADITIONAL ARTS AUDIENCES

Consistent with the eclectic attendance habits of audiences surveyed, Traditional arts audiences, when asked to name the three performance types they would like to see more often, cited a wide variety. Table 4.3 reports these relationships, and indicates that while the performance type surveyed is invariably most frequently mentioned, (in other words audiences want to see more of what they came to see), there is strong interest in performances of the three disciplines of dance, theatre, and music.

Although theatre in the form of drama and comedy was the most frequently attended of all Traditional performance types, it is not the discipline that necessarily elicits the strongest level of interest in more frequent attendance. In fact, audiences are often more interested in attending other performance types within each general Traditional discipline. This is certainly the case for music: those attending symphonic performances are more likely to cite opera as something they would like to see more of than theatre; similarly, the chamber music and classical soloist audience are more likely to cite symphonic music than theatre. The same is also true in the case of contemporary dance audiences and their strong interest in ballet. Exceptionally, this interest is not returned in the case of Ballet audiences. Fewer than one-in-five make contemporary dance one of their three choices, preferring more often to attend theatre and symphonic music.

As noted earlier, avant-garde audiences indicate some small preference for similar fare in other general disciplines. The same weak trend is apparent in Table 4.3.

Contemporary dance and contemporary classical music audiences are the most likely to express interest in attending more experimental theatre. The same trend is true for the avant-garde type of products of the other two disciplines.

Audiences of Traditional types of performances also express some interest in attending performances of popular types more frequently. The chief beneficiary of this interest is musicals. One quarter of responses cite musicals as one of the three types of performances they would like to attend more frequently. Additionally, there is strong interest among theatre audiences in stand-up comedy and some interest, among avant-garde audiences of the three main disciplines in jazz and blues. This is especially the case among contemporary classical music audiences.

Table 4.3

AUDIENCE: TYPE OF PERFORMANCE LIKE TO ATTEND MORE FREQUENTLY BY AUDIENCE TYPE*

TRADITIONAL PERFORMING ARTS

	Ballet	Cont. Dance	Theatre-Drama	Theatre-Comedy	Theatre-A.G.	Symph. Music	Symph. Pops**	Cont. Class**	Chamber/ Soloists	Opera	Choral	Total
	%	%	%	%	%	%	%	%	%	%	%	%
TRADITIONAL												
Ballet	53	18	25	30	5	26	-	-	8	27	6	23
Cont. Dance	35	38	25	23	15	17	-	-	8	19	6	10
Theatre-Drama	21	9	38	42	9	20	-	-	6	16	6	25
Theatre-Comedy	16	9	33	49	10	16	-	-	6	13	5	30
Theatre-A.G.	15	22	32	31	31	18	-	-	8	16	4	7
Symphonic Music	30	5	21	18	3	46	-	-	22	32	18	24
Symphonic "Pops"	24	4	19	28	2	35	-	-	11	21	15	-
Cont. Classical	20	23	20	11	20	37	-	-	21	26	9	-
Chamber/ Soloists	26	8	22	16	6	41	-	-	32	28	20	11
Opera	30	6	24	21	4	35	-	-	14	43	16	19
Choral	21	8	20	15	6	38	-	-	24	20	30	10
POPULAR												
Pop/Rock	17	7	18	31	5	13	-	-	3	10	4	15
Jazz/ Blues	20	7	23	26	5	25	-	-	9	12	14	14
Folk	11	6	20	30	5	15	0	0	7	8	9	8
Country	7	2	9	17	2	6	-	-	2	5	2	7
Musical	20	6	31	41	3	16	-	-	3	14	7	26
Stand-up Comedy	14	6	22	44	5	12	-	-	4	8	3	26
OTHER												
Children's	19	10	26	37	8	13	-	-	5	13	6	4
Ethnic/Heritage	17	16	19	17	9	15	-	-	9	18	10	6

Table 4.3 (cont.)

AUDIENCE: TYPE OF PERFORMANCE LIKE TO ATTEND MORE FREQUENTLY BY AUDIENCE TYPE*

	POPULAR PERFORMING ARTS							OTHER	
	Pop/rock	Jazz /blues	Folk	C & W	Musicals	Stand-up comedy	Children's	Ethnic/ heritage	Total
	%	%	%	%	%	%	%	%	
TRADITIONAL									
Ballet	13	8	4	4	29	16	4	6	23
Cont. dance	14	18	7	3	23	17	5	8	10
Theatre - drama	12	12	6	4	32	33	3	3	25
Theatre - comedy comedy	15	12	5	6	31	38	4	4	30
Theatre - A.G.	18	22	5	2	18	23	2	6	-
Symphonic	6	12	5	2	24	10	2	5	24
Symphonic "pops"	13	13	7	5	36	19	3	6	-
Cont. classical	10	29	8	3	11	10	2	14	-
Chamber/soloists	5	13	6	4	15	11	2	8	11
Opera	5	3	9	2	33	14	2	7	19
Choral	8	7	10	7	19	12	1	6	20
POPULAR									
Pop/Rock	50	12	18	9	20	39	4	4	15
Jazz/Blues	12	34	8	8	25	24	2	11	14
Folk	15	15	41	20	23	31	4	12	8
Count. & West.	20	10	8	67	15	20	2	8	7
Musicals	13	9	5	8	46	35	5	4	26
Stand-up comedy	34	13	7	8	20	61	3	3	26
OTHER									
Children's	20	6	12	7	23	21	25	5	4
Ethnic/Heritage	10	22	19	13	13	17	5	36	6

* Respondents were allowed up to three choices of performance type.

** These categories were not included in the question on more frequent attendance of audiences.

1.3.2 Popular Arts Audiences

Interest among audiences of Popular performance types is as varied as for their Traditional counterpart. Of particular note is the strong interest shown by Popular audiences, with the exception of country music audiences, in attending more theatre, particularly theatre-comedy. As with Traditional performing arts audiences, among audiences for most types of Popular performances, there is strong interest in attending more musicals. Also consistent with Traditional performing arts audiences, Popular performing arts audiences would most prefer to attend the performance type at which they were surveyed.

1.3.3 TRADITIONAL ARTS GENERAL PUBLIC

A somewhat similar pattern of interest in attending as that found for audiences is apparent for the general public, and this is shown in Table 4.4. The figures cited in the table for each performance type, shown on the left-hand side of the table, include only the attitudes of those who report attending a performance in a specific type within the previous six months. The *interest in attending* data is taken from a question which asked respondents which performance types they would like to see more of.

The results in Table 4.4 confirm the strong interest in theatre found among attenders. In most instances, this interest is proportionally as strong, if not stronger, than the interest in the type attended. Thus, for example, among those who report attending a chamber or classical soloists' concert in the last six months, 57% mention an interest in attending more drama, compared with 47% saying they would like to attend chamber/soloist music performances.

Also confirmed is a relatively strong interest in ballet and symphonic music, especially strong among attenders of other Traditional types of classical music performances.

Confirmation is also evident for the interest in avant-garde performances among those who already constitute an audience for this type of performance. For example, avant-garde theatre attenders are among the most likely to report an interest in attending more contemporary dance performances and vice versa.

In the case of Popular performance types, there is strong interest expressed by Traditional arts performance attenders in a number of Popular arts types of performance.

Musicals, stand-up comedy, jazz/blues and pop/rock all receive strong expressions of interest on the part of self-reported attenders of traditional performances, as types to attend more frequently.

Table 4.4

GENERAL PUBLIC: TYPES OF PERFORMANCES LIKE TO SEE MORE OF

	TRADITIONAL PERFORMING ARTS									
	Ballet %	Cont. Dance %	Theatre-Drama %	Theatre-Comedy %	Theatre-A.G. %	Symph. Music %	Symph. Pops %	Chamber/ Solo %	Opera %	Choral %
ATTENDED IN LAST 6 MONTHS										
TRADITIONAL										
Ballet	52	24	53	51	15	42	20	19	28	12
Cont. dance	35	46	52	56	27	34	24	16	23	13
Theatre-drama	29	21	63	60	19	35	25	16	22	14
Theatre-comedy	23	17	50	67	17	29	22	12	17	11
Theatre-A.G.	31	30	56	60	43	35	24	19	24	12
Symphonic music	36	19	55	53	15	56	30	29	32	22
Symphonic "pops"	29	18	46	52	17	32	48	16	19	12
Chamber/ soloists	37	22	57	54	19	52	27	47	34	26
Opera	39	18	53	50	14	45	22	23	50	15
Choral	30	20	52	57	15	42	28	26	28	41
POPULAR										
Pop/Rock	23	19	46	55	17	24	21	10	14	8
Jazz/Blues	28	24	50	55	22	35	21	16	18	10
Folk	27	24	49	52	22	31	23	17	18	15
Count. & West.	16	13	34	42	12	15	15	7	8	8
Musicals	29	17	53	57	16	33	24	13	21	16
Stand-up comedy	20	16	44	60	16	24	20	9	14	7
OTHER										
Children's	29	22	49	58	17	28	24	12	15	13
Ethnic/ Heritage	27	23	49	54	19	31	22	15	20	14
TOTAL	19	12	38	45	10	22	17	9	13	9

Table 4.4 (cont.)

GENERAL PUBLIC: TYPES OF PERFORMANCES YOU LIKE TO SEE MORE OF

	POPULAR PERFORMING ARTS						OTHERS	
	Pop/rock %	Jazz /blues %	Folk %	C & W %	Musicals %	Stand-up comedy %	Children's %	Ethnic/ heritage %
ATTENDED IN THE LAST 6 MONTHS								
TRADITIONAL								
Ballet	31	29	16	14	43	32	17	23
Cont. dance	47	39	22	18	41	44	25	37
Theatre-drama	39	33	22	17	43	39	18	22
Theatre-comedy	40	29	17	18	40	45	19	19
Theatre-A.G.	43	39	28	15	36	43	24	30
Symphonic music	26	32	19	13	44	29	17	22
Symphonic "pops"	46	36	15	17	43	40	20	22
Chamber/ soloists	24	34	23	13	43	29	17	24
Opera	27	27	14	8	42	31	15	19
Choral	25	25	24	16	46	34	23	27
POPULAR								
Pop/Rock	71	38	19	24	34	54	20	20
Jazz/Blues	52	63	21	15	36	49	18	21
Folk	41	39	52	30	39	41	22	34
Count. & West.	39	26	22	62	28	42	19	24
Musicals	36	28	21	20	56	35	20	21
Stand-up comedy	56	37	14	23	35	71	78	18
OTHER								
Children's	46	31	22	27	41	45	48	26
Ethnic/ Heritage	41	34	26	25	38	41	24	48
TOTAL	38	24	16	25	31	38	17	18

1.3.4 POPULAR ARTS GENERAL PUBLIC

Those among the public reporting attendance at Popular performing arts performances in the last six months, also express interest in a wide variety of performance types. Of particular interest is the strong enthusiasm for theatrical performances, again with the exception of experimental theatre. Also of interest is the fact that while musicals as a performance type are a firm favourite among attenders of Traditional types of performances, audiences of Popular types also enthusiastically express interest in musicals.

1.4 The Relationship Between Current Attendance Patterns and Interest in Further Attendance

1.4.1 AUDIENCES AND FURTHER ATTENDANCE

While interest on the part of audiences in attending further performances of a variety of types beyond the one at which a respondent was surveyed is high, a large proportion of audiences also express an interest in attending performances more frequently of the type at which they were surveyed. Table 4.5 shows the relationship between performance type attended, frequency of attendance and interest in attending more frequently.

A glance at this table leaves little doubt that, at least for audiences, there is an appetite for more. For each type of performance, from a third to a half of the audience indicates an interest in attending more frequently than at present. Moreover, even among those who are relatively frequent attenders, (that is they report attending three or more performances, in the last complete season, of the type at which they were surveyed), interest in more frequent attendance is high.

There are, though, variations in interest by performance type. Generally, audiences at performances of contemporary dance, avant-garde theatre, chamber music/classical soloists, and choral music have limited interest in greater attendance at the type at which they were surveyed. Ballet, symphonic music and opera, on the other hand, have audiences with a strong interest in greater attendance.

Turning to audiences of Popular and other types of performances, the level of interest varies greatly by performance type. However, it is also clear from Table 4.5 that those who did not attend during the last complete season have far less interest in more frequent attendance than those who are more regular attenders. Thus, in the case of those making up the pop/rock audience, of the 33% who did not attend a performance last season, 23% are content with their level of attendance and 10% would like to attend more frequently.

Table 4.5

AUDIENCE AND GENERAL PUBLIC: LEVEL OF INTEREST IN ATTENDING FURTHER PERFORMANCES BY TYPE OF PERFORMANCE*

	AUDIENCE ATTENDANCE LAST SEASON						GENERAL PUBLIC				
	ATTENDED 3/4 TIMES		ATTENDED 1/2 TIMES		DID NOT ATTEND		ATTENDED IN LAST 6 MONTHS		ATTENDED IN LAST 5 YEARS		NEVER ATTENDED
	Content	Like More	Content	Like More	Content	Like More	Content	Like More	Content	Like More	Content
	%	%	%	%	%	%	%	%	%	%	%
TRADITIONAL											
Ballet	13	20	28	30	3	5	3	3	5	16	73
Cont. dance	10	11	39	18	18	4	3	2	5	9	80
Theatre - drama	22	18	28	18	10	4	9	15	6	22	48
Theatre - comedy	4	12	30	23	12	9	9	18	7	27	38
Theatre - A.G.	11	7	34	16	24	8	3	2	3	8	84
Symphonic music	36	27	13	11	7	5	5	7	5	15	68
Symphonic "pops"***							4	4	5	13	73
Contemporary classical							-	-	-	-	-
Chamber and soloist	25	13	29	9	21	2	2	3	3	6	85
Opera	16	20	21	17	15	11	2	2	3	10	82
Choral	16	8	34	14	22	5	4	6	5	5	80
POPULAR											
Pop/Rock	8	10	23	26	23	10	8	19	5	18	50
Jazz/Blues	20	8	30	12	25	5	5	8	3	15	69
Folk	11	7	18	18	35	10	4	4	5	10	77
Count. & West.	9	20	10	28	22	12	6	9	5	15	66
Musicals	9	6	28	29	17	11	8	11	7	20	53
Stand-up comedy	8	7	34	29	13	9	5	14	6	20	50
OTHER											
Children's	20	4	35	10	29	3	8	8	6	9	69
Ethnic/Heritage	19	7	31	20	19	4	7	6	7	11	69

* Includes those who have never attended, but would like to attend performances.

** Respondents were asked to indicate which types of performance they would like to see more of.

*** The symphonic "pops" and contemporary classical music performance types were not options for this question in the audience survey, while contemporary classical music was not an option in the general public survey.

Among regular attenders, that is, those who did attend in the last complete season, jazz/blues, musicals, stand-up comedy and, especially, country music audiences all express high levels of interest in attending performances more frequently.

1.4.2 General Public and Further Attendance

As noted earlier, the proportion of the Canadian population reporting that they had never attended specific types of performances is quite high. However, when asked if they would like to attend performances, Table 4.5 indicates that there is potential to both attract new audiences as well as build from the existing audience base within the general public.

For many Traditional performing arts, twenty percent or more of the public say they are interested in attending more frequently. In particular, those who have not attended in the last six months or ever, show quite strong interest in attendance.

Ballet, drama and comedy, in particular, and symphonic music all show 15% or more of the population expressing interest in attending more frequently.

Contemporary dance, experimental theatre, chamber music and classical soloists, and choral music all have smaller proportions of the population expressing interest in attending performances more frequently.

When those in the public who report that they have attended a performance in the last six months are considered, the desire for more frequent attendance is especially strong among those who have recently attended theatrical performances of drama and comedy.

Finally, in terms of Traditional performances, it is clear that in most cases a majority of the population, in addition to never having attended specific performance types, also have very little interest in attending. This tendency is most pronounced for contemporary dance, experimental theatre, chamber music, opera and choral music, where 80% or more of the population identify these performance types as ones that they have little interest in attending.

Not surprisingly, given some of the earlier findings, the largest potential audiences in the Traditional performing arts, are for theatre, specifically drama and comedy.

Interest in Popular performing arts types is clearly no greater than it is for some of the Traditional performance types. Even for pop/rock, musicals, and stand-up comedy, half the population have never attended and have very little interest in attending. However, among the other half of the population, interest in more frequent attendance is quite high.

1.4.3 TASTES AND PREFERENCES

A further way of measuring the potential audience for various types of performances is to enquire about what kinds of performances they enjoy. The results from these questions are shown in Table 4.6 (the audience questions relate only to musical listening preferences, while the general public were, in addition, asked about enjoyment of theatre and dance).

As Table 4.6 makes clear, interest in classical music among audiences is high, with two thirds of all audiences attending performances of Traditional types saying they listen to classical music a "great deal." A third also indicate that they listen a "great deal" to opera and or choral performances. These responses would appear to confirm earlier findings in this chapter that audiences of Traditional types of performances have broad tastes in terms of traditional performances, rather than being narrowly focused on only one performance discipline or type.

Table 4.6

AUDIENCE AND GENERAL PUBLIC: MUSIC LISTENING, THEATRE AND DANCE INTERESTS

	AUDIENCE (PERCENT SAYING LIKE TO LISTEN TO A GREAT DEAL)			GENERAL PUBLIC (PERCENT SAYING ENJOY A GREAT DEAL)		
	TOTAL	TRADITIONAL	POPULAR	TOTAL	TRADITIONAL	POPULAR
	%	%	%	%	%	%
Pop	19	16	25	31	31	35
Rock	19	15	28	33	32	40
Jazz/Blues	20	19	26	21	24	25
New age	9	8	10	-	-	-
Folk	12	10	14	14	15	14
Count. & West.	8	6	14	24	17	23
Easy listening	21	21	22	-	-	-
Classical	53	61	33	25	33	24
Opera/Choral	27	33	13	13	19	13
Theatre*	-	-	-	43	59	47
Cont. dance/ Ballet	-	-	-	13	19	15

* Theatre and Dance were not included as items in the audience survey

The same broad tastes are less apparent among Popular performing arts audiences and the interest levels reported for each genre are far lower. In fact, the highest proportion for any musical genre is classical music with one-in-three saying they like listening a "great deal." Once again, this suggests that audiences for the Popular performing arts are

not necessarily a separate audience from those who attend performances of Traditional types. As noted earlier, the cross-over audience is quite considerable.

Among the general public, and considering musical types first, a quarter of the population say they greatly enjoy classical music. This is only slightly below the figures for pop and rock. It also suggests that the potential audience for various types of classical music performances is about a quarter of the Canadian population.

Turning to theatre and dance, the strong interest in theatre identified earlier in this Chapter is again confirmed, as over four-in-ten of the population say they greatly enjoy theatre. In contrast to classical music and theatre, the potential audience for dance, at least based on this question, appears much lower. Only 13% say they greatly enjoy contemporary dance/ballet a great deal, a smaller proportion compared to other genres.

1.5 Community Size Variations in Reported Attendance and Interest in More Frequent Attendance

While reported attendance and interest in more frequent attendance vary greatly by performance type, another source of variation in response is community size. As reported in Chapter 3, there is considerable variation in performance attendance by community size.

Table 4.7 shows responses by performance type and confirms the general finding of greater reported attendance and interest in larger communities. However, there are a number of exceptions. It is clear from Table 4.7 that little variation in reported attendance and interest in more frequent attendance exists in communities of 1 million and more and in those of 100,000 to just under 1 million. At the same time, in many instances reported attendance and interest in further attendance among those living in communities of 10,000 to 99,999 are quite similar to the larger urban centres. It is in smaller communities and rural areas that reported attendance and interest are well below other communities.

However, even in smaller communities, a quarter (24%) of the population report attendance at a theatre to see a comedy. An even larger number (42%) say they would be interested in seeing this type of discipline more frequently.

It is also clear from Table 4.7 that a number of performing arts types which are based in larger metropolises have substantially larger audiences. For example, when community size is analysed, 9% of the population report attending opera in the three major urban areas, and 18% report an interest in more frequent attendance.

There is one instance in Table 4.7 of a larger proportion reporting attendance in smaller communities than in large centres. This is in the country and western performance type. Clearly, this type of music is much more popular in smaller communities and rural areas than in larger urban centres.

Presumably, one reason for a lower proportion of the population in smaller communities and rural areas reporting attendance is availability of performances. It is clear, however, from Table 4.7, that interest is also lower in smaller communities. This suggests that lower levels of interest restrain attendance as well as limited availability. Presumably,these two factors are linked. Thus, it is highly possible that limited availability leads to limited attendance, which in turn limits interest, which then further limits attendance.

Table 4.7

GENERAL PUBLIC: ATTENDANCE IN THE LAST SIX MONTHS AND INTEREST IN ATTENDING MORE FREQUENTLY BY COMMUNITY SIZE

	PERCENT OF GENERAL PUBLIC REPORTING ATTENDANCE AT EACH TYPE OF DISCIPLINE WITHIN THE LAST SIX MONTHS					PERCENT REPORTING AN INTEREST IN ATTENDING DISCIPLINES MORE FREQUENTLY				
	COMMUNITY SIZE					COMMUNITY SIZE				
	ONE MILLION OR MORE	LESS THAN 100,000-999,999	10,000-99,999	LESS THAN 10,000/ RURAL	TOTAL	ONE MILLION OR MORE	100,000-999,999	10,000-99,999	10,000/ RURAL	TOTAL
	%	%	%	%	%	%	%	%	%	%
TRADITIONAL										
Ballet	8	7	4	2	6	22	21	18	12	19
Contemporary dance	8	7	4	3	6	15	11	11	8	12
Theatre-drama	28	28	20	15	24	42	40	34	29	37
Theatre-comedy	32	28	22	24	27	48	48	44	42	46
Theatre A.G.	7	6	3	4	5	12	10	7	9	10
Symphonic music	16	14	10	6	12	27	24	21	14	22
Symphonic "pops"	11	9	6	6	8	19	17	16	16	17
Chamber/soloists	7	6	5	3	5	10	10	6	7	9
Opera	9	5	3	2	5	18	13	11	8	13
Choral	10	9	9	10	9	10	8	7	10	9
POPULAR										
Pop/Rock	31	30	19	22	27	38	42	35	33	37
Jazz/Blues	18	16	9	6	13	27	27	21	16	23
Folk	6	10	9	8	8	12	17	14	15	14
Count. & West.	7	15	16	23	15	13	22	28	36	24
Musicals	25	20	17	14	19	35	32	33	26	32
Stand-up comedy	23	21	14	16	19	41	40	35	40	39
OTHER										
Children's	16	16	15	16	16	15	16	16	19	16
Ethnic/Heritage	13	16	8	12	13	17	16	18	23	18

1.6 Psychographic Variations by Performance Type

In the initial psychographic analysis, two types of orientations were identified that had very positive attitudes toward the performing arts and frequent attendance at performances of Traditional types. Given this situation, it is not surprising to find that both the Believers and the Devoted are strongly represented in audiences for many of the performance types shown in Table 4.8.

In particular, these two segments are heavily represented among the public who report attending ballet (52%), contemporary dance (49%), avant-garde theatre (51%), symphonic music (46%), chamber music (52%), and opera (51%) performances in the last six months. (The figures in brackets represent the proportion of those attending each type of performance in the last six months who are either in the Devoted or Believer segments. It will be recalled from Chapter 2 that among the public overall, just 25% were in these two segments.)

The lower representation of these two "arts" psychographic categories among drama and comedy, symphonic "pops" and choral audiences suggests that they are somewhat different audiences in orientation than the audience for other Traditional performance types. Certainly, in the case of drama and comedy these are types with fairly large audiences that appear to reach well beyond the Traditional audience. Certainly audiences of Popular types of products were the most likely to cite theatrical performances of dramas and comedies as the performance types they had attended in the last complete season.

In the case of those attending symphonic pops performances in the last six months, it may be that this audience is also fairly diverse in their interest, although their attendance patterns, as noted earlier, did not appear to differ that markedly from the patterns found for other Traditional performance types.

The lower proportion of Devoted and Believers in the ranks of the choral attenders may well have to do with the nature of the choral audience. Possibly the motive for attending and the types of performances attended may reflect a religious motivation as well as an interest in choral music per se. Certainly, choral audiences were among the least likely to report attending Popular types of music performances.

Among those attending Popular performances in the last six months, the concentration of segments is somewhat different. Those making up the Devoted segment are generally well below the proportions found among the traditional performance attenders. However, significant numbers of Believers are to be found among jazz/blues, folk, and musicals attenders.

Table 4.8

GENERAL PUBLIC: PERFORMANCE TYPE AND PSYCHOGRAPHICS*

	Devoted	Believers	Practitioners	Conditionals	Uncommitted	Uninvolved	Carefree Pop/Rockers	Tuned Out
TRADITIONAL								
Ballet	21	31	16	16	9	6	1	0
Cont. dance	15	34	14	13	10	8	4	2
Theatre - drama	15	27	15	15	13	7	4	3
Theatre - comedy	12	24	15	16	12	13	6	3
Theatre - A.G.	14	37	12	11	12	7	4	4
Symphonic music	18	28	20	16	8	6	2	2
Symphonic "pops"	8	29	15	20	11	10	4	3
Chamber/ soloists	20	32	14	17	10	4	2	1
Opera	17	34	12	17	10	3	3	5
Choral	12	27	13	20	10	11	6	1
POPULAR								
Pop/Rock	8	22	13	16	16	12	10	4
Jazz/Blues	13	30	12	15	14	8	6	2
Folk	10	27	13	19	14	12	4	2
Count. & West.	4	15	10	25	15	20	7	5
Musicals	11	27	18	15	11	11	5	2
Stand-up comedy	9	20	13	18	14	13	9	3
OTHER								
Children's	10	23	17	17	11	13	5	3
Ethnic/Heritage	10	25	13	20	12	11	4	5

* The public included in each performance type are those who have attended a specific type in the last six months.

** Table should be read across the rows which total to 100%, rather than down the columns.

1.7 Expectations of a Performance

It is clear from Chapter 2 that price and the particular piece being performed were two of the most significant determinants of attendance at a performance. In this section, the issue of the determinants of attendance is again explored, but this time from the point of view of expectations about the performance itself. The presentation of this material has been saved for this chapter because it was felt that there would be considerable variation in expectation by performance type.

In measuring expectations of a performance, respondents were asked to select their three most important from a list of expectations. In addition, the general public respondents were asked to identify their single most important expectation. The results, shown in Tables 4.9 and 4.10, indicate that overall there are two major expectations across audiences and the general public: that the performance allows problems to be forgotten and that it makes you feel good. Furthermore, for the general public, that the performance be entertaining is an important expectation and in fact is the most frequently cited. In all, a quarter of the public cited this expectation as their first choice (this item was not asked of audiences so no comparison can be made).

Audiences are distinct from the general public in the greater importance they give to the expectation that a performance have a strong emotional impact.

Other items shown in Tables 4.9 and 4.10 are of less significance to audiences and public alike. However, there are some variations in responses between audiences and general public that are of importance. The public are more likely than audiences to cite the expectation that a performance be about real people facing real life situations. Presumably audiences are somewhat more likely to be prepared to suspend reality.

The other variation is the greater importance assigned by audiences to the *providing insight into who you are* role.

Finally by way of an overview, two areas of expectations that both the audience and the general public agree is a lower priority, is that performances be about social issues and that performances be created and performed by Canadian artists.

Table 4.9

AUDIENCE: EXPECTATIONS OF A PERFORMANCE BY TYPE OF PERFORMANCE ATTENDED

(PERCENT CITING EACH AS ONE OF TOP THREE EXPECTATIONS)

	Allows you to forget problems	Makes you feel good	Has strong emotional impact	Is entertaining	About real people facing real life situations	Is spectacular	Provides insight into who you are	About social issues	Created/ performed by Can. artists
TRADITIONAL									
Ballet	57	59	58	-	20	34	26	20	18
Cont. dance	46	44	57	-	26	29	43	24	23
Theatre - drama	53	50	54	-	32	19	34	28	18
Theatre - comedy	55	52	50	-	31	21	34	27	15
Theatre - A.G.	32	26	63	-	23	29	53	45	23
Symphonic music	61	60	48	-	27	26	26	19	17
Symphonic "pops"	67	68	43	-	28	27	21	14	16
Cont. classical	44	44	62	-	21	30	43	24	21
Chamber/ soloists	47	48	55	-	28	23	35	23	19
Opera	54	52	55	-	23	29	28	16	22
Choral	56	57	56	-	28	23	29	16	17
POPULAR									
Pop/Rock	62	65	46	-	26	29	28	17	20
Jazz/Blues	60	55	53	-	30	25	32	20	15
Folk	62	66	46	-	32	22	26	21	15
Count. & West.	71	68	35	-	35	27	20	20	14
Musicals	69	67	49	-	25	34	20	16	13
Stand-up comedy	71	66	39	-	24	36	23	17	17
OTHER									
Children's	58	54	53	-	27	25	35	20	14
Ethnic/Heritage	43	57	58	-	29	24	31	27	16
TOTAL	56	56	52	-	27	26	30	22	18

* The "entertaining" item was not asked on the audience survey.

Table 4.10

GENERAL PUBLIC: EXPECTATIONS OF A PERFORMANCE BY TYPE OF PERFORMANCE ATTENDED

(PERCENT CITING EACH AS ONE OF TOP THREE EXPECTATIONS)

Attended in last 6 months	Allows you to forget problems	Makes you feel good	Has strong emotional impact	Is entertaining	About real people facing real life situations	Is spect-acular	Provides insight into who you are	About social issues	Created/ performed by Can. artists
TRADITIONAL									
Ballet	41	46	29	51	33	28	24	21	23
Cont. dance	42	45	32	48	36	28	28	18	21
Theatre - drama	46	43	27	49	39	28	24	22	19
Theatre - comedy	49	43	24	51	35	28	21	23	20
Theatre - A.G.	38	29	33	39	45	33	34	24	21
Symphonic music	44	46	28	49	38	25	24	20	21
Symphonic "pops"	45	39	25	44	38	30	24	25	23
Chamber/ soloists	35	42	33	49	38	25	28	22	21
Opera	42	44	27	52	36	31	22	19	18
Choral	41	46	22	49	39	25	21	23	21
POPULAR									
Pop/Rock	45	43	29	50	36	31	23	19	22
Jazz/Blues	45	42	31	48	34	32	24	21	19
Folk	42	43	29	49	39	27	24	23	20
Count. & West.	44	38	20	44	48	32	21	22	22
Musicals	44	44	28	49	38	26	20	22	21
Stand-up comedy	48	42	25	50	35	35	21	21	20
OTHER									
Children's	44	43	26	45	42	30	22	21	23
Ethnic/Heritage	45	42	24	45	41	28	25	25	20
PUBLIC	47	43	23	48	37	28	19	20	19
PUBLIC FIRST CHOICE	21	16	5	25	14	8	4	3	2

Although there is broad agreement across performance types as to expectations, there are some notable variations apparent in Tables 4.9 and 4.10. Perhaps the most consistent from the audience data is the distinction identified earlier in this chapter between those who could be defined as the avant-garde audience and the other audiences.

As Table 4.9 makes clear, contemporary dance, experimental theatre and contemporary classical music audiences have very different expectations, downplaying both the *forgetting problems* and *feeling good* items. Instead, the *providing insight* expectation

rates well above average for these groups, and particularly for the experimental theatre audience, that performances be about social issues. Also of importance for these avant-garde audiences is that the performance have a strong emotional impact.

Elsewhere in the audience data, variations across Traditional performance types are minimal. While this may seem surprising in view of the different experiences various types of performances provide, it may be given that Traditional audiences appear to attend a number of different types of performances, that they have broad expectations, and that these change dependent upon the performance type. The question, it should be recalled, did not ask about specific performance types but about respondent expectations generally, of a show or performance.

However, the lack of differentiation by audiences, and the large proportion citing a small number of expectations, suggests that these are general orientating expectations for most audiences, with the exception of those who attend avant-garde performances.

Consistent with the above, the general public in answering these questions also shows very little variation by performance type. (Again, as with previous analysis in the chapter, a general public audience for specific performance types is defined as having reported attendance in the last six months.)

The distinction, among general public respondents, between avant-garde attenders and others is less pronounced than for the audience, but in the case of experimental theatre, clearly exists. It is not apparent, however, among those who report attending a contemporary dance performance in the last six months. Interestingly, experimental theatre attenders are also well below average in their expectation that a performance be entertaining. This could well be the way the avant-garde audience might have responded had they been asked this question. Overall, this suggests that avant-garde audiences have a much more "serious minded" attitude toward performances than other audiences.

Among audiences of popular performances types and general public attenders, also shown in Table 4.9 and 4.10, distinctions between types of performances are limited and the general patterns described for public and audience overall prevails. The major exceptions are the somewhat greater expectation, among country music audiences and reported general public attenders of country music, that performances be about real people, facing real-life situations, and the lower expectation that performances have a strong emotional impact.

1.8 Scheduling of Performances

The general public, as well as those attenders among the audiences of Traditional and Popular performances types in the last six months, have very definite preferences for the days and the times that they like to attend performances. Table 4.11 indicates that close to half prefer Saturday as a first choice, and when second choices are considered, close to seven-in-ten make Saturday a first or second choice. Friday is a distant second with half making it a first or second choice. By contrast with these two days, other days of the week are insignificant in terms of overall interest in them as preferred days.

Significantly, however, given the fact that few performances take place on Sunday, this day is cited as a first or second choice by 16% of the population, a higher proportion than for any weekday.

Although the weekend is clearly the preferred time of·the week for attending performances, it is also clear from Table 4.11 that evenings are overwhelmingly preferred to afternoons. However, when afternoons are preferred, the preference tends to be by a two-to-one margin for weekend over weekday time periods. When pressed further on the time for afternoon performances, it is clear also from Table 4.11 that 2:00 p.m. is the preferred time most frequently cited. As far as the timing of evening performances is concerned, it is clear from that starting times later than 8:00 p.m. are not popular, though times between 7:00 and 8:00 are. In all, 86% of the population selected a time within this period, with a plurality, (41%) choosing 8:00 p.m..

One option suggested by these times is that of having earlier start times from Monday to Thursday, say at 7:30 p.m., in order to allow patrons to get home at a reasonable time, and 8:00 p.m. curtain times on Friday and Saturday.

Table 4.11 also indicates that differences by Traditional or Popular performance types are minimal. Similarly, differences by specific performance disciplines are also minimal.

Table 4.11

GENERAL PUBLIC: SCHEDULING OF PERFORMANCES

	TOTAL POPULATION		ATTENDED TRADITIONAL PERFORMANCE IN LAST SIX MONTHS		ATTENDED POPULAR PERFORMANCE IN LAST SIX MONTHS	
	FIRST CHOICE	SECOND CHOICE	FIRST CHOICE	SECOND CHOICE	FIRST CHOICE	SECOND CHOICE
PREFERRED DAY	%	%	%	%	%	%
Monday	2	4	1	4	2	4
Tuesday	2	2	3	3	3	3
Wednesday	5	4	6	5	5	5
Thursday	5	6	7	7	6	7
Friday	26	29	25	29	26	31
Saturday	45	22	44	22	45	22
Sunday	4	12	4	12	4	11
Any day	9	11	9	12	9	11
No opinion	2	10	1	8	1	7

	TOTAL POPULATION	TOTAL ATTENDED TRADITIONAL PERFORMANCE IN LAST SIX MONTHS	TOTAL ATTENDED POPULAR PERFORMANCE IN LAST SIX MONTHS
PREFERRED TIME FOR ATTENDING A PERFORMANCE			
Weekday evenings	18	20	19
Weekend evenings	69	68	71
Weekday afternoon	4	4	3
Weekend afternoon	8	7	7
No opinion	2	1	1
PREFERRED TIMES FOR AFTERNOON PERFORMANCES			
1:00 p.m.	9	8	8
1:30 p.m.	14	14	14
2:00 p.m.	40	42	42
2:30 p.m.	7	8	7
3:00 p.m.	9	10	11
3:30 p.m.	2	2	2
4:00 p.m.	4	4	4
4:30 p.m.	9	9	9
No opinion	6	4	4
PREFERRED TIMES FOR EVENING PERFORMANCES			
6:00 p.m.	2	1	1
6:30 p.m.	2	1	1
7:00 p.m.	20	17	18
7:30 p.m.	26	28	26
8:00 p.m.	41	45	44
8:30 p.m.	4	5	5
9:00 p.m.	3	3	4
No opinion	2	1	1

1.9 Ticket Purchasing

1.9.1 When

Just as Canadians appear to have very real preferences for attending a performance, so too do they have definite preferences about when to purchase tickets. As Table 4.12 points out, sooner rather than later appears to be preferred by both audiences and the general public who have attended performances in the last six months. Fully a third of the public indicate that they would sooner purchase tickets as soon as they go on sale. While this option was not offered audiences, it is clear that many like to obtain tickets well ahead of time. Overall, 53% say they prefer to have tickets at least several weeks before a performance.

Clearly, for both audience and public, performance attendance is planned well ahead of time. Differences between Traditional and Popular types of performance audiences are minimal on this issue.

Table 4.12

AUDIENCE AND GENERAL PUBLIC: TICKET PURCHASING — WHO PURCHASES AND HOW

	AUDIENCE			GENERAL PUBLIC		
				ATTENDANCE IN LAST SIX MONTHS		
	TOTAL %	TRADITIONAL %	POPULAR %	TOTAL %	TRADITIONAL %	POPULAR %
PERSON USUALLY PURCHASING						
Self	73	73	72	56	58	57
Spouse/partner	16	16	18	15	14	13
Son/daughter	1	1	2	2	2	1
Parent	3	3	3	2	2	2
Friends	4	4	4	5	5	6
Work/Other organization	1	0	1	1	1	1
Depends	-	-	-	20	20	20
No opinion	2	3	2	0	0	0
WHEN PREFER TO PURCHASE TICKETS FOR PERFORMANCE						
Day of	12	13	8	10	8	8
Day before	4	5	4	3	3	3
A week before	28	29	27	21	20	20
Several weeks before	35	34	37	25	27	26
A month or more before	10	9	11	7	8	8
Two months or more before	8	7	10	-	-	-
WHEN PREFER TO PURCHASE TICKETS FOR PERFORMANCE						
As soon as on sale	-	-	-	34	34	36
No opinion	3	4	2	0	0	0
PURCHASE TICKETS*						
By telephone through major ticket outlet	14	13	18	32	35	36
In person through major ticket outlet	15	14	18	45	46	47
By telephone to box office	36	35	34	26	30	28
In person at box office	40	39	42	40	40	39
By mail	6	7	2	5	6	5
By fax	0	0	0	1	1	1
No opinion	3	3	2	1	0	0
HOW PREFER TO PURCHASE TICKETS						
* By telephone through major ticket outlet	16	16	19	21	22	24
In person through major ticket outlet	15	14	19	24	23	23
By telephone to box office	42	43	36	20	22	20
In person at box office	26	30	30	20	19	19
By mail	9	9	7	2	3	2
By fax	3	3	3	1	1	1
By automatic teller machine	-	-	-	10	10	11
No opinion**	15			1	0	1

* Responses add to more than 100% because multiple answers were accepted.

** Because the *no opinion* total exceeds 10%, the percentages have been recalculated to exclude the *no opinion* percentage.

1.9.2 HOW

Audiences and the Canadian general public use a variety of methods for purchasing tickets. For audiences, however, this typically involves using the box office and either ordering tickets by phone or in person. As Table 4.12 indicates, only a minority mention making use of ticket agencies.

The situation is very different among the general public. Ticket agencies are cited as frequently as box offices as sources for tickets, while in-person ticket purchasing at both is cited more frequently than telephone. When preferences are considered, there is no consensus among the public regarding the optimal outlet or the method used to purchase tickets. Once again, variations by Traditional and Popular type performances are minimal.

When preferences regarding how tickets are ideally purchased are explored, it is clear that while in general, the pattern does not shift greatly, there are some important preferences not being exercised. The greatest shift between how purchasers obtain tickets and how they would like to obtain tickets, is in terms of the use of the telephone. Certainly, for audiences, *by telephone to the box office* is the clear leader, with just over four-in-ten citing this method. Among the public, the same trend is apparent. While in-person access was more frequently cited previously, when preferences were raised, a disproportionate focus on in-person purchasing is replaced by equal proportions citing a preference for purchasing in person and by telephone. The implication here is that more people would like to purchase over the telephone than do at present.

The other point of difference in terms of preferences is the lack of change in terms of ticket agencies versus box offices. The proportions citing a preference for each of these outlets changes little. This suggests that there is no pent up demand for easier access to one of these outlets. The demand instead appears to be for easier access by telephone than to either type of outlet.

Finally, on the issue of outlets, when actual behaviour is considered using the audience data on how they purchased their ticket for the performance surveyed, there is no great difference from that reported by the general public when the question was asked in a general way. As Table 4.13 notes, most audiences used a box office to purchase their tickets for the performance at which they were surveyed. The major difference is that fewer audiences surveyed report purchasing by telephone at a box office (23%) compared with in-person purchasing (40%). Given the interest in telephone purchasing, this confirms the existence of some pent up demand for increased telephone access to box office services.

Table 4.13 also indicates that there are few variations by type of performance attended and method used to purchase tickets for the performance surveyed. The only audience type that appears to be well above average in their use of ticket agencies are country music audiences. To a much lesser extent, audiences for musicals are also above average in their use of agencies.

Table 4.13

AUDIENCE: TICKET PURCHASING FOR PERFORMANCE ATTENDED

Type	Method of Purchasing: By telephone through ticket agency	In person through ticket agency	By telephone at box office	In person at box office	Mail	No opinion
TRADITIONAL						
Ballet	6	18	22	39	3	14
Cont. dance	4	16	17	50	1	11
Thea. drama	4	7	38	36	3	13
Thea. comedy	5	15	33	29	3	14
Thea. av-gar	10	9	21	43	1	16
Symph. music	5	8	14	50	3	18
Symph. pop	5	7	21	44	2	20
Con. clas. mus	2	6	11	59	1	20
Chamber mus.	3	5	12	54	2	25
Opera	7	15	28	36	2	12
Choral music	8	13	16	42	4	15
POPULAR						
Pop/rock	9	18	25	34	1	12
Jazz/blues	8	11	22	39	2	17
Folk music	8	13	17	48	1	14
Count & West	12	33	9	34	0	12
Musicals	15	13	33	26	3	9
Comedy	6	18	21	42	0	12
OTHER						
Childr' prod.	2	24	21	43	0	7
Ethn/heritage	6	15	15	53	0	10
TOTAL	7	14	23	40	2	13

In terms of box office use, the various performance types do vary considerably in terms of the extent to which in-person or telephone use prevails. Among contemporary dance, symphonic music, contemporary classical, and chamber music audiences, in-person use of the box office is high. Possibly for some of these performance types, telephone purchasing is difficult or limited, or the purchaser prefers the personal contact of the box office services.

1.9.3 EXCHANGE ISSUES

Many performance attenders are occasionally unable to attend a performance for which they have a ticket. How this situation should be dealt with by box offices and companies is of obvious importance. That it is an issue is evident from the fact that 21% of audience members indicate that they have at times not bought tickets because they did not think the box office would exchange them or refund their money in the event of their being unable to attend. For half of those saying that they have been in such a situation, this appears to be at least an occasional predicament.

In all, 8% say this has happened frequently, while another 46% of this group say it has occurred occasionally. The implication here is that the fear of not being able to exchange or get a refund for tickets is a barrier for some part of the audience, albeit a small proportion. Differences between Traditional and Popular performances audiences are non existent on this issue. Although the difficulty of exchanging tickets or getting a refund may be an actual barrier to purchasing for only a minority of the population, it nonetheless appears to be an irritant for many in the audience and public.

The evidence for this is to be found in Table 4.14. When respondents were asked what a box office should do if a person could not attend a performance, very few appeared to support any policy to not take tickets back, only 5% among audiences and 8% among the general public opted for this approach. Few (less than one-in-five) also opted for the idea that box offices take tickets back and try to sell them. Far more acceptable was the idea of exchanging tickets for another performance which over four-in-ten endorsed. Also of some interest, at least to the public, was the idea of a refund, although this was not as strongly supported as the idea of exchanging tickets. Differences between Traditional and Popular performances audiences are once again minimal.

Table 4.14

AUDIENCE AND GENERAL PUBLIC: TICKET PURCHASING — EXCHANGE ISSUES

	AUDIENCE			GENERAL PUBLIC ATTENDANCE IN LAST SIX MONTHS		
	TOTAL %	TRADITIONAL %	POPULAR %	TOTAL %	TRADITIONAL %	POPULAR %
WHAT SHOULD BOX OFFICE DO IF YOU CANNOT ATTEND A PERFORMANCE						
Take your tickets back and refund				35	31	32
Full refund	17	16	19			
Partial refund*	7	7	8			
Take your tickets back and exchange them for another performance	49	52	45	42	47	44
Take your tickets back and try to sell them for you**	18	17	19	14	14	15
Not take your tickets back	5	5	6	8	8	9
No opinion	4	4	4	1	0	0

* The audience question had two choices: A full and a partial refund, the general public simply mentioned a refund.

** The audience question said: Help you sell your tickets.

1.9.4 TICKET PURCHASING OPTIONS

While, as noted earlier, the piece being performed is an important part of the purchasing decision, it is not the only element. In order to determine the kind of flexibility that marketers have in terms of ticket purchase options, audiences were asked to indicate their level of interest in purchasing tickets under various scenarios. The results of this testing are shown in Table 4.15. What is immediately clear from Table 4.15 is that certain ideas are strongly endorsed, while others are just as strongly rejected. Two suggestions are equally well received.

First supported was the idea that a frequent attender system be introduced, one which awarded points when tickets are purchased that go toward free tickets. A substantial 38% of the audience members say they would be very interested in purchasing tickets if this option were available.

Almost as attractive is the idea of purchasing tickets through machines like Automatic Teller Machines, used by banks, which could display a seating plan and through which tickets could be purchased with credit cards, or through a deduction from one's bank account. In all, 38% also said they would be very interested in purchasing tickets through this system. Related to this approach was the option of purchasing tickets using a home TV and telephone, with a seating plan displayed on the screen. One-in-three audience members say they would be "very" likely to purchase tickets under this system.

Table 4.15

AUDIENCE: TICKET PURCHASING OPTIONS

	VERY INTERESTED	SOMEWHAT INTERESTED	NOT TOO/NOT AT ALL INTERESTED	NO OPINION
	%	%	%	%
If could earn points for free tickets	38	30	27	5
If could purchase tickets through ATM which showed seating plan	38	27	30	5
If could purchase tickets by phone using your TV to see seating plan	32	29	34	5
If tickets for shows with poor reviews were sold at a discount	18	35	42	5
If could purchase tickets for show don't know much as part of a festival	6	41	47	6
If could see show at 6.00 p.m., after work	7	18	69	6
If could see live performance by major international stars on TV in a local auditorium	6	12	77	6

Receiving somewhat less support is the idea that tickets for shows with poor reviews be sold at a discount. Fewer than one-in-five expressed great interest in the option.

The remaining three alternatives all receive limited support in terms of audiences saying they would be very interested in purchasing tickets. The first of these, purchasing tickets for shows *you don't know much about, but which are part of a festival,* receive very little strong interest, but some lukewarm interest. Overall, 41% say they are "somewhat" interested.

Finally, the options of seeing a show at 6:00 p.m. after work, and seeing performances by major international stars on a TV screen in a local auditorium are ideas with virtually no expressed interest on the part of audiences.

Overall, there are few variations by performance type attended in terms of the level of interest in the options. Where there are variations it is generally experimental theatre audiences and pop/rock audiences who are somewhat higher than the average in level of expressed interest.

Thus, in terms of the frequent attender "points" option 53% of experimental theatre audiences and 47% of pop/rock audiences say they are "very" interested in purchasing tickets under this scenario. The ATM option also shows these two groups well ahead of other audience types in their level of interest. In all, 56% of experimental theatre audiences and 48% of pop/rock audiences say they are very interested. In addition, contemporary dance (45%) and contemporary classical music (45%) audiences say they are very interested in purchasing tickets if this approach were available. The fact that the three avant-garde audiences all score high on the ATM idea suggests that this may simply be a somewhat more adventurous group than other types of audience.

A further variation is the quite strong interest expressed by experimental theatre audiences for purchasing tickets at a discount if a performance has had poor reviews. Thirty-two percent (32%) of experimental theatre audiences say they are very interested in this option. This suggests that experimental theatre audiences may have a higher proportion of "risk takers" than found among other audiences.

1.10 Ticket Price Issues

Only two ticket/subscription issues will be dealt with in this section. The remaining issues will be dealt with in more detail in the individual performance type sections.

1.10.1 Single Ticket

As part of the analysis for Chapter 3, price flexibility was explored by zone and it was apparent that many in the audience were prepared to pay somewhat more for a ticket. Table 4.16 takes this issue further and shows the relationship between being prepared to pay more and the price a person paid for the ticket for the performance at which they were surveyed. As well, willingness to pay more is quite strong across all ticket prices.

Table 4.16

AUDIENCE: WILLINGNESS TO PAY MORE
AMOUNT PAID FOR SINGLE TICKET

HIGHEST AMOUNT	LESS THAN $10	$10 - $19.99	$20 - $29.99	$30 - $39.99	$40 - $49.99	$50 - $74.99	$75 OR MORE	TOTAL
Willing to attend if ticket prices increased by:								
$2	30	31	30	28	23	22	18	28
$4	20	23	23	20	22	14	17	22
$6	15	10	9	9	8	11	5	11
$10	15	14	13	16	19	22	29	14
Would not attend if prices were higher	15	16	19	22	20	25	22	16
No opinion	6	7	5	5	8	5	7	6

Even among those paying less than $20 for a ticket, a quarter or more say they are willing to pay $6.00 or more. At the same time, there is some evidence in Table 4.16 that those paying the highest amounts are prepared to pay the most in additional costs. The relationship, however, between price and willingness to pay a greater price is not strong. Therefore, there is no strong and compelling evidence here that those who pay the highest price for tickets will automatically accept the greatest dollar increase, even if it is proportionally no greater than lower ticket price increases. This suggests caution must be exercised in simple across the board percentage increases in ticket prices.

Having said this, however, when the increases presented to respondents, as they are when the subscription price increases were posed in terms of percentage increases, there is no consistent variation by the value of the subscription (see Table 4.17). Significant proportions (close to four-in-ten) of the audience appear willing to pay at least an additional 5% for a subscription series. Furthermore, close to half appear willing to pay at least 10% more for a subscription series (see Table 4.17).

Table 4.17

AUDIENCE: WILLINGNESS TO PAY MORE FOR A SUBSCRIPTION SERIES

	AMOUNT PAID FOR SUBSCRIPTION SERIES						
	LESS THAN $50	$50 - $99	$100 - $199	$200 - $299	$300 - $399	$400 OR MORE	TOTAL
HIGHEST AMOUNT WILLING TO CONTINUE SUBSCRIBING IF PRICES INCREASED BY: (LARGEST INCREASE PREPARED TO PAY)							
5%	38	38	42	42	46	41	42
10%	24	28	27	25	22	18	26
15%	28	22	19	18	18	27	22
WOULD DISCONTINUE SUBSCRIPTION IF PRICE HIGHER	7	7	8	10	11	10	9
No opinion	4	4	4	4	4	4	4
TOTAL	14	28	30	14	7	7	100

Only current subscribers answered these questions.

The implication of Table 4.17 is that if subscription price increases can be presented to audiences in terms of percentage increases then this might lead to more acceptance, especially among those paying larger amounts. Unfortunately, the ability to communicate about percentage price increases is not as possible with single ticket purchasers.

1.10.2 Subscription Issues: Preferences and Reported Behaviour

Subscriptions are, for most performing arts organizations, an assurance of the future, since they guarantee a minimum level of attendance for a season. Having said this, it is surprising to find, as Table 4.18 shows, that one third of the audience surveyed do not recall being contacted regarding purchasing a subscription series in the past year.

Among audiences for Traditional types of performances, the percentage contacted is higher, but even here only 60% of contemporary dance audiences and only 58% of experimental theatre audiences report being contacted.

Not surprisingly, the proportion reporting that they prefer purchasing subscription tickets varies considerably by type of performance attended. Predictably, the greatest variations are between the Traditional and Popular performing arts types, though it should be noted that the latter's production structures do not easily allow for long-term season planning and subscription offerings. However, even among the Traditional performing arts types, variations in preference are extensive.

Thus, for example, the audiences for avant-garde performances are all much less likely than audiences of other Traditional performance types to say that they prefer to purchase

a subscription series over a single ticket. There are also some extensive differences for mainstream, traditional performance types. Ballet audiences are quite low in their level of preference for subscriptions, while symphony audiences are among the highest expressing a preference for subscriptions, as are chamber/soloist audiences and opera and drama audiences.

Actual reported levels of subscription also vary greatly by performance type, but follow the preferences discussed above. Thus, the largest proportion of audiences currently subscribing are found among symphonic music, symphonic "pops", chamber music and classical soloists, opera and drama audiences.

Of the Traditional performance types, ballet audiences, in addition to being the least likely to report subscribing, are also the least likely to express an interest in subscribing. This lack of penetration is compounded by the fact that ballet audiences are among the most likely to say that they no longer subscribe to any type of performance.

Consistent with the discussion above regarding preferences of the avant-garde audience, there is only limited subscription penetration among the audience for these performance types. Many, however, have subscribed in the past, possibly to other types of performance. This suggests that avant-garde audiences may have been part of other audiences at some time, and many, in fact, as noted earlier, continue to attend Traditional types of performance.

Finally, on the subject of Traditional performances, as a way of getting an accurate measure of the actual subscribers by performance, the proportion of those reporting that they were subscribers to the performance surveyed is shown. These figures are consistent with the other results presented in Table 4.18 and indicate the low level of subscriptions among ballet and avant-garde audiences and the relatively high level of subscription among some of the other mainstream performance types, including drama, opera, and especially symphonic music, symphonic "pops" and chamber/soloist disciplines. The low level of subscription among avant-garde audiences is also reconfirmed.

There is little to say regarding subscription among Popular performing arts audiences, given that few performance types offer subscription series. Of note, however, is the high proportion of jazz/blues audiences who report a preference for subscription over single tickets, who say they currently subscribe to some type of performance, and who report that they have a subscription series for the jazz/blues performance at which they were surveyed.[1]

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1 It must be noted that several jazz and blues performances surveyed were included in some sort of jazz week or blues festival, often in season, where most probably a ticket or pass for several or all performances were available. Other than these periodical events, few jazz and blues performances are found in the regular programming of professional facilities, and year-long subscriptions are unlikely to be common.

Table 4.18

AUDIENCE: SUBSCRIPTION ISSUES

AUDIENCE TYPE	PERCENT SUBSCRIBING TO PERFORMANCE	PERCENT CONTACTED REGARDING SUBSCRIBING	PERCENT PREFERRING SEASON/ SUBSCRIPTION TICKET	CURRENT SUBSCRIPTION: PERCENT CURRENTLY	PERCENT NOT NOW BUT IN PAST	PERCENT NEVER
TRADITIONAL						
Ballet	32	70	38	42	26	32
Cont. dance	26	60	31	37	26	37
Theatre - drama	46	74	52	57	17	25
Theatre - comedy	27	67	37	39	26	35
Theatre - A.G	23	58	25	25	26	49
Symphonic	62	80	56	67	16	17
Symphonic "pops"	64	80	64	69	12	19
Cont. classical	13	70	26	37	33	30
Chamber/soloist	56	77	52	58	24	19
Opera	47	85	53	62	21	17
Choral	37	74	46	54	20	27
POPULAR						
Pop/Rock	3	45	15	17	21	62
Jazz	44	74	37	43	24	33
Folk	14	50	20	18	31	51
Count. & West.	0	35	4	6	15	79
Musicals	10	53	21	24	25	51
Stand-up comedy	7	41	15	12	23	65
OTHER						
Children's	24	59	26	27	26	46
Ethnic/Heritage	3	57	11	19	23	58
TOTAL	33	67	39	44	22	34

As noted in Table 4.18, a substantial minority of the population report that they no longer subscribe. There appears to be a number of reasons that former subscribers give for this. These reasons are shown in Table 4.19. Two reasons, however, dominate.

The issue of more choice over when and what to attend is one, and 40% of those responding to this question say this is a very important reason. The other significant reason is cost; 35% of those no longer subscribing cite this as a very important reason.

Table 4.19
AUDIENCE: IMPORTANCE OF REASONS FOR NO LONGER SUBSCRIBING

	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT TOO/ NOT AT ALL IMPORTANT	NO OPINION
Want more choice in what you attend and when	32	42	20	19
Cannot afford subscription	30	42	22	20
No longer have time				8
Don't want to go alone				9
Type of work company puts on is not of interest to you	15	50	28	13
Company's performances got repetitious	15	49	28	14
No longer enjoy this type of performance				7

* Percentages have been recalculated to exclude *no opinion* responses because of their large proportion.

Some reasons for non-renewal of subscriptions are conspicuous by their lack of importance. In particular, the product itself, or the performers, rarely appear to be the issue. Only 10% and 7%, respectively, cite the *company's performances becoming repetitious* and *no longer enjoy this type of performance* as very important reasons.

Finally, in terms of reasons for non-renewal, there is very little variation by performance type. In other words the rationales found in Table 4.18 apply across the board to all Traditional performing arts organizations.

One important implication is that the main problems cited are those over which marketers have some control. Ways to offer more choice and flexibility, and different pricing strategies, can obviously be explored as options for building a subscription base.

These and other options are explored more fully in Table 4.20, which shows audiences for Traditional performance types' reactions to a range of subscription options. (Only Traditional audiences were used in this part of the analysis, because it is only these types of performances that regularly offer subscriptions.).

Some confirmation for the importance of the reasons for non-renewal can be found in the fact that three of the top five items selected as important by audiences of Traditional types of performance are precisely those of most significance to non-renewers: flexibility regarding choice, time and price. In all, 50% of Traditional performing arts attenders say they would be very interested in subscribing if they could choose only those performances they wanted to attend, while 44% rate as very important that they could buy a pass to choose their nights to attend, rather than choose a set night. Also related to flexibility is the top ranked option: being able to exchange unused tickets for other performances. As far as the price issue is concerned, 55% say they would be very interested if there were better discounts for subscribers. The other option receiving considerable support is that of a frequent attender program where 44% of audiences say they are very interested.

Table 4.20

TRADITIONAL AUDIENCE: LEVEL OF INTEREST IN SPECIFIC SUBSCRIPTION OPTIONS*

	VERY INTERESTED	SOMEWHAT INTERESTED	NOT TOO/ NOT AT ALL INTERESTED	NO OPINION
	%	%	%	%
If could exchange used tickets	56	28	10	6
If given a subscription series as a gift	55	25	12	7
If better discount for subscribers	55	30	10	6
If could choose only those performances wanted to attend	50	32	12	6
If could buy pass to choose your night	44	30	18	7
If could earn points toward special shows	44	26	22	7
If could choose to subscribe to more than one type of performance	34	34	25	7
If could pay subscription in instalments	22	25	46	7
If there were special events for subscribers	21	27	45	7
If could choose different seats for different performances	22	32	40	7
If subscription series had particular themes and educational background material	21	35	37	7
If subscription series included special performances for children	9	13	70	8

* Current or previous subscribers only answered this question.

1.11 Information Related Issues

Audiences and the general public use a wide variety of sources to find out about performances that they are interested in attending. For both groups, word of mouth and daily newspaper advertising are consistently the most frequently cited sources. In fact, as Table 4.21 demonstrates, when audiences were asked to identify the single most important source for the performance at which they were surveyed, over half mentioned one of the two main sources cited above, with fully one-in-three citing word of mouth.

Clearly, the reputation of a production is vital to effective marketing, given the importance of word of mouth sources.

The importance of these two sources for audiences is confirmed through another question which asked respondents to identify their three most important sources of information for finding out what is available. This time, daily newspapers receive a some-

what larger share of mentions. Other important sources for audiences include radio advertising, daily newspaper articles, brochures and schedules.

While most of the same sources are important to the general public, the intensity with which they are mentioned is quite different. Thus, in addition to the importance assigned to word of mouth and daily newspaper advertising, radio advertising is given considerable significance by the public, as is television. By contrast, and largely because they are less in contact with performance brochures and schedules, these promotional tools are mentioned much less frequently by the general public. The importance of television is significant, not so much because of the lack of its use by Traditional performing arts groups, but because the public is probably thinking about movies rather than live performances, or about shows like the *Phantom of the Opera* and *Les Miserables*, which have been heavily advertised through television in specific markets.

The importance of television, however, cannot be ignored, as it remains one of the public's most preferred channels. At the same time, Table 4.21 also demonstrates that daily newspaper advertising and word of mouth continue to be the most frequently preferred sources. Radio also continues to be a preferred source.

These results suggest that a two stage communications strategy is required for audience development: one that maintains existing patrons through brochures and schedules and one that seeks to build new audiences through a greater use of daily newspaper and radio advertising, as well as television advertising, at least where markets are large enough to justify costs.

Table 4.21

AUDIENCE AND GENERAL PUBLIC: INFORMATION SOURCES USED AND PREFERRED FOR FINDING OUT ABOUT PERFORMANCES

	AUDIENCE		GENERAL PUBLIC**	
	Most important source for performance attended %	Important sources %	Important sources %	Preferred sources %
Word of mouth	33	45	51	32
*(Daily) Newspaper advertising articles	19	55	51	37
*(Daily) Newspaper articles	6	27	22	18
Weekly newspaper	-	10	14	10
Weekly newspaper specializing in entertainment	-	11	9	11
Magazine specializing in arts/entertainment	-	6	5	10
Magazines	2	-	-	-
Radio - advertising	5	20	41	27
Radio - interviews/features	1	11	10	9
Television - advertising } Television - int./features }	3	12	37	28
Brochures	4	28	6	11
Box office	1	4	1	2
Billboards/posters	3	13	8	7
Direct mail	1	-	-	-
Cards/post card to home	-	-	2	7
Schedule	-	19	7	10
Program/previous event	5	15	4	4
Information in lobby	-	4	2	2
Newsletter	2	-	-	-
Organization putting on event	4	-	-	-
Telemarketing	0*	0	-	-
Work/social group	4	-	-	-
No opinion	3	1		

* Signifies less than 0.5%

** Up to three choices accepted

In terms of getting information out to potential patrons, there are three types of information that Traditional arts audiences say they most want. These requirements are shown in Table 4.22. As this table notes, information about place, time and date is rated the most significant information. This is followed by information regarding the content, in other words what type of experience they can look forward to, which is consistent, as noted in Chapter 3, with the importance of the piece being performed as the main factor influencing a decision to attend a performance. Finally, audiences of Traditional performing arts types seek information about price.

Table 4.22

AUDIENCE:
MOST SIGNIFICANT INFORMATION REQUIRED ABOUT A PERFORMANCE
(TWO CHOICES ACCEPTED)

	TOTAL	TRADITIONAL	POPULAR
INFORMATION ON:	%	%	%
Place, time, date	69	73	68
Content of performance	47	50	37
Ticket price	43	40	50
Reviews of performance	15	16	14
Performers	13	13	11
No opinion	1	1	2

The rating of these elements is somewhat different among audiences of popular performing arts for whom price is in second place and content third. Possibly the slightly lower average income of audiences of these types of performances means that they are more sensitive to price as an issue.

Significantly, for audiences of both Traditional and Popular performing arts types, reviews of performances are of limited significance, as are the performers. This suggests that the overall performance and its reputation in the court of public opinion is more significant in most cases than the actual performers per se.

Although audiences appear to give little importance to reviews of performances in terms of the information they like to have about a performance, many (close to half among audiences and a third among the public overall) nonetheless report that they look most days at the Arts and Entertainment section of the daily newspaper (see Table 23). At the same time, one half of audiences and a quarter of the Canadian public report that they *frequently/most days* read reviews and reports relating to the performing arts. This suggests that there is significant interest in reading about the performing arts, even if it is in many instances to find out what is available.

When reviews are read, however, it is clear from Table 4.23 that audiences and the general public demonstrate very different reasons for reading reviews. Audiences read reviews, more often than not, to compare their own views on a performance with a critic, though rarely to decide to attend. The Canadian public, Table 4.23 suggests, read reviews to either get information about the time and place of a performance or to make a decision about attending. In the latter case, the critic is playing the role of the gatekeeper for the general public. This is a role, however, that the critic does not appear to play as much for the current audience, if at all.

Table 4.23

AUDIENCE AND GENERAL PUBLIC: KEEPING UP WITH THE PERFORMING ARTS

	AUDIENCE			GENERAL PUBLIC ATTENDANCE IN LAST SIX MONTHS		
	TOTAL	TRADITIONAL	POPULAR	TOTAL	TRADITIONAL	POPULAR
	%	%	%	%	%	%
ARTS/ENTERTAINMENT SECTION OF NEWSPAPER						
Most days	49	51	46	33	39	38
Only on weekends	34	34	35	36	39	38
Rarely	13	12	15	23	16	19
Never	2	2	3	6	5	5
No opinion	1	1	2	3	1	1
FREQUENCY OF PAYING ATTENTION TO REVIEWS/ REPORTS/ ARTICLES ABOUT PERFORMING OR VISUAL ARTS						
Most days	-	-	-	24	29	26
Only on weekends	-	-	-	28	34	31
Rarely	-	-	-	35	30	33
Never	-	-	-	11	5	8
No opinion	-	-	-	2	2	1
FREQUENCY OF READING REVIEWS OF LIVE SHOWS						
Frequently	50	53	43	-	-	-
Occasionally	34	32	39	-	-	-
Rarely	12	11	13	-	-	-
Never	2	3	4	-	-	-
No opinion	1	1	1	-	-	-
MAIN REASON FOR PAYING ATTENTION TO REVIEWS OF LIVE SHOWS						
To make a decision about attending	12	11	15	32	31	33
To know how show was rated by a critic	23	24	21	18	19	16
To compare comments with your own	48	50	43	14	15	15
To get information about time and place of performance	14	12	17	34	34	35
No opinion	3	2	4	2	1	1

1.12 The Program

Most members of the audience at performances of Traditional performing arts types say they obtain a program for the performances they attend. In all, 91%, as shown in Table 4.24, indicate same for the specific performance at which they were surveyed. Among audiences at Popular types of performances, the number is much lower, at six-in-ten.

Programs also get used. Six-in-ten for both Traditional and Popular performing arts audiences obtaining a program say they read all of the program received for the performance surveyed; another fifth say they read three quarters of the program.

Table 4.24

AUDIENCE: PROGRAM READERSHIP

	TOTAL	TRADITIONAL	POPULAR
PERCENT OBTAINED A PROGRAM FOR THE PERFORMANCE	81	91	59
AMOUNT OF PROGRAM READ			
All of it	60	59	61
Three quarters	19	19	16
Half	11	12	10
Less than half	6	6	6
No opinion	4	3	7
EXTENT PROGRAM ENHANCES ENJOYMENT			
Greatly	44	46	35
Somewhat	42	41	46
Not too much/not at all	8	8	9
No opinion			

Programs also enhance enjoyment. Close to half of audiences of traditional performance types say the program notes greatly enhanced their enjoyment of the performance. Somewhat fewer Popular performance audience members indicate this for the performance they attended.

Overall, when performance types are considered in relation to the program, as shown in Table 4.25, it is clear that while there are some variations, audiences generally read the program and believe it enhances their enjoyment of the performance.

Among Traditional performance types, opera audiences seem to find the program particularly helpful. This may well be because it is not always easy to follow events when the opera is sung in languages other than English or French. The audience for theatrical performances, on the other hand are less likely than others to find the program adds to their enjoyment.

When Popular performance types are considered, country music audiences are quite distinct in saying that they never obtain a program, do not read one when one is available, and do not find it useful. It may well be that programs are not of any significance or need in the venues where country music is most often performed. Overall, though, programs are generally less important to audiences of Popular types of performances, even for those attending musicals.

The extensive use and importance of house programs generally, suggests they should be attended to, and underlines the potential for additional earned revenues through program ad sales.

Table 4.25

AUDIENCE: PROGRAM READERSHIP AND PERFORMANCE TYPE

			EXTENT PROGRAM ENHANCES ENJOYMENT		
	PERCENT OBTAIN PROGRAM	PERCENT READ ALL OF PROGRAM	GREATLY	SOMEWHAT	COMBINED
TRADITIONAL					
Ballet	88	52	47	40	87
Cont. dance	94	64	42	43	85
Theatre - drama	91	53	34	48	82
Theatre - comedy	88	57	36	45	81
Theatre - A.G.	78	67	36	40	76
Symphonic	93	54	51	41	92
Symphonic "pops"	90	55	50	41	91
Cont. classical	91	70	47	40	87
Chamber/soloists	96	75	51	40	91
Opera	92	60	65	26	91
Choral	90	62	51	41	92
POPULAR					
Pop/Rock	37	56	38	45	83
Jazz/Blues	73	70	41	45	86
Folk	39	64	40	33	73
Count. & West.	6	25	12	12	24
Musicals	81	55	32	49	81
Comedy	64	64	30	52	82
OTHER					
Children s	54	51	46	36	82
Ethnic/Heritage	56	69	36	54	90
TOTAL	81	60	44	42	86

2 THE TYPES OF PERFORMING ARTS PRODUCTS

2.1 Ballet

2.1.1 ATTENDANCE PATTERNS

Overall, while 17% of Canadians report having ever attended a ballet performance, based on the responses of audiences, those who constitute the current audience attend on a regular basis. For example, only 8% among the ballet audiences surveyed say they did not attend a performance in the last complete season, while 92% reported attendance. Relative to other performance types, however, ballet audiences report attending fewer times throughout the season. A large portion (58%) report only attending one or two performances during the last complete season, although this is likely a reflection of availability, particularly outside major centres.

Despite relatively infrequent attendance and a small audience base, there is interest among both ballet audiences and general public in attending ballet performances more frequently. Among the public, 19% indicate an interest in attending more frequently, and among ballet audiences a majority (55%) indicate a desire for more frequent attendance. The task of converting much of this desire to actual behaviour may be a challenge, though, because the largest proportion of those indicating an interest in more frequent attendance are currently those who attend with somewhat less frequency. Among ballet audiences, it is those who report attending one or two times last season, and among the public, it is those who have attended in the last five years, but not in the last six months. The challenge then is to reach those whose contact with ballet is somewhat infrequent.

In seeking to broaden the audience base, the obvious place to look is among audiences for other performing arts products. Just as ballet audiences appear to attend a wide range of other performance types, other audiences also attend ballet performances. Audiences of other performance types are also interested in attending more ballet performances. Most notably, contemporary dance, symphonic music and opera audiences, where 35%, 30% and 30%, respectively, say they would like to attend more performances of ballet.

At the same time, a fifth or more of audiences at a number of other types of performances also express an interest in attending more ballet. These audiences include: drama (21%), symphonic "pops" (24%), contemporary classical music (20%), chamber and classical soloists (26%), choral (21%), jazz/blues (20%) and musicals (20%).

Among the Canadian public who have attended a performance of some type in the last six months, the results are fairly consistent with the audience data. Recent attenders to contemporary dance (35%), symphonic music (36%), chamber and classical soloists (37%) and opera (37%) are the groups most likely to express an interest in more frequent attendance at ballet performances.

While it is understood that the audience for ballet may never be large, the fact that 17% of the population have attended a ballet performance at some point, is not an insignificant proportion. Furthermore, when asked how much they enjoyed different types of performing arts, 13% say they like dance a great deal. (The question combined contemporary dance and ballet in one statement.) These two figures suggest that the potential market for ballet is in the region of a fifth to a quarter of the population.

2.1.2 Expectations and Perceptions

Part of the limited audience for ballet may have to do with the kinds of expectations and preferences audiences have about dance performances generally. Some of these preferences and expectations are revealed in Table 1, which shows responses to a series of agree/disagree statements about dance.

It is clear from Table 1 that a number of elements in a production are of importance to audiences. In particular, there is a strong desire on the part of ballet audiences to want to see pieces that display the skill and talent of the dancers. Over six-in-ten among ballet audiences say they strongly agree with this position. There is also a strong desire from audiences generally, and ballet audiences in particular, to want ballet performances with live music: half of ballet audiences say they strongly agree with this position, while close to half of audiences generally, strongly agree.

Other statements show a somewhat lower level of agreement, but still indicate quite strong demand on the part of ballet audiences and audiences generally. The desire for performances that offer a new experience is strong among both ballet audiences and audiences in general, with over six-in-ten agreeing with this position and over one third strongly agreeing. At the same time, there is strong support for the idea that ballet audiences prefer the familiar. As Table 1 notes, close to two thirds of ballet audiences reject the idea that they "don't like to go to performances of pieces that are well known." While four-in-ten among the ballet audiences strongly reject this position, audiences generally are less willing to reject this position so strongly.

Possibly, audiences generally are not as enthused about the "classic" ballet pieces as the ballet audience may be.

While ballet audiences seek new experiences, in addition to the tried and true, they are not necessarily seeking innovative and contemporary dance performances. Only half of ballet audiences agree that they are seeking this, and only a quarter agree strongly.

The suggestion in these responses is that ballet audiences, in fact, have a strong interest in the familiar, while at the same time they are attracted to new performance experiences. This likely adds up to audiences wanting something a little different from what they know, but not too different.

Those who are not ballet audiences are more likely to seek the unfamiliar. This suggests that to build audiences for ballet, introductory performances of unfamiliar and unusual pieces for a general audience might be attempted. Possibly, those who do not attend ballet performances regularly believe ballet performances consist of pieces they define as "old fashioned" and are not interested in. The conundrum is that, it is these pieces which convince infrequent attenders that ballet has little new to offer, and which keep the regular audiences coming back for more.

Other attributes of a performance that appear to have some importance are that the sets be interesting and attractive, and that there be a story that can be followed. These, however are not demands that are as strongly expressed as the desire to see pieces that display the skill of dancers, live music, and new experiences but familiar pieces.

Table 1

BALLET AUDIENCE: STATEMENTS ABOUT DANCE

	Agree strongly	Agree somewhat	Agree/ Disagree slightly	Somewhat Disagree	Strongly Disagree	No opinion
Prefer performance with live music	%	%	%	%	%	%
Total audience	46	27	18	2	1	5
Traditional audience	46	27	18	2	1	5
Ballet audience	51	27	18	2	1	2
Prefer performances that offer a new experience						
Total audience	32	31	26	3	2	6
Traditional audience	32	31	26	4	1	6
Ballet audience	36	30	22	6	2	3
Like to see pieces that display skill and talent of dancer						
Total audience	45	28	18	2	2	6
Traditional audience	45	28	17	3	2	6
Ballet audience	61	24	11	1	0	2
Prefer performances that have interesting and attractive sets						
Total audience	23	31	31	6	3	6
Traditional audience	22	29	33	6	3	6
Ballet audience	29	31	31	5	3	2
Prefer performances that have a story that you can follow						
Total audience	22	30	30	8	5	6
Traditional audience	20	29	31	9	5	6
Ballet audience	24	28	32	11	4	2
Like innovative and contemporary dance performances						
Total audience	22	24	33	9	7	6
Traditional audience	22	23	32	9	7	6
Ballet audience	24	24	36	5	8	2
Don't like to go to performances of pieces that are well known						
Total audience	5	7	30	24	28	6
Traditional audience	5	7	28	24	30	6
Ballet audience	5	6	22	23	41	2

While, as noted, ballet audiences have somewhat different expectations regarding the specifics of a performance, when broad general expectations are considered they are very similar to other audiences. Notably, they seek performances that leave them with a good feeling, that allow them to forget the world and their problems for a while, and that involve them emotionally.

The general public's expectations are only slightly different, namely that a performance be entertaining (this item was not asked of audiences). In addition, the public are less concerned about the emotional impact of a piece. It is also clear, that ballet audiences and attenders from the general public are generally not seeking important insights about the human condition, social statements, or pieces that bring about self reflection from a ballet performance.

2.1.3 TICKET PURCHASING AND SUBSCRIPTION ISSUES

In their ticket purchasing habits ballet audiences appear to be little different from other audiences. They tend to be more likely to purchase in person and to do so through the box office. And like other audiences they would like to do more purchasing using the telephone.

Relative to some of the other mainstream types of Traditional performing arts, ballet audiences are somewhat less likely to be subscribers. Only 32% of the audiences at the performances surveyed subscribed to the performance attended, while 42% were currently subscribing to some type of performance. This is somewhat lower than some other performance types.

2.1.4 PRICING ISSUES

Relative to other types of performances, including Traditional performances, ballet audiences paid on average somewhat more for their tickets. As Table 2 notes, the mean amount for ballet performances is $25 compared to $21 and $23 respectively, for Traditional arts and all audiences surveyed. The higher mean for ballet performances is a result of two factors: fewer ballet audiences paid less than $15 (19%), compared to Traditional audiences (28%) and audiences generally (28%), and more ballet audiences paid $30 or more (21%) relative to Traditional audiences (12%) and audiences generally (17%).

Possibly because they are used to paying higher prices, ballet audiences are also the most prepared to pay higher ticket prices and the least likely to say they would not be prepared to pay any more than they did for their ticket.

Table 2 shows that 28% of ballet audiences are prepared to pay at least $6 more while 51% are prepared to pay at least $4 more and 76% are prepared to pay at least $2 more. This suggests that there is some price flexibility, certainly in terms of $2 to $4 increases for single tickets.

Table 2
BALLET AUDIENCE: TICKET AND SUBSCRIPTION PRICE ISSUES

	BALLET AUDIENCE %	TOTAL TRADITIONAL AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	6	9	10
$10 - $14	13	19	18
$15 - $19	24	25	21
$20 - $24	16	17	15
$25 - $29	12	9	9
$30 - $34	7	4	5
$35 - $39	5	2	3
$40 - $49	4	3	3
$50 - $74	4	2	4
$75 or more	1	1	2
Gift	3	4	4
No Opinion	5	6	6
Mean amount	$25	$21	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	25	27	28
$4.00 higher	23	22	21
$6.00 higher	11	10	10
$10.00 higher	17	14	14
NOT ATTEND IF ANY HIGHER:	13	16	17
No opinion	10	11	10
AMOUNT PAID FOR YEAR'S SUBSCRIPTION:			
Less than $50	12	13	15
$50 - $99	14	26	28
$100 - $199	18	30	30
$200 - $299	32	15	14
$300 - $399	16	7	6
$400 or more	6	7	6
No opinion	20	18	19
Mean amount	$209	$159	$151
NUMBER OF PERFORMANCES IN SUBSCRIPTION:			
3 performances	10	7	8
4 performances	28	16	17
5 performances	21	23	25
6 or more performances	41	52	50
No opinion	32	27	28
CONTINUE WITH SUBSCRIPTION IF PRICES INCREASED BY:			
5%	47	42	43
10%	24	26	26
15%	19	22	23
Would discontinue	8	9	9
No opinion	17	15	16

* Those questions with *no opinion* above 10% have been recalculated to exclude the *no opinions.*

As noted above, only 32% of those surveyed at a ballet performance had subscription tickets to the performance. Moreover, prices varied considerably in terms of the amount paid. While the mean amount is $209, a quarter say they paid less than $100 for their subscription series. However, these prices are relatively higher than those paid by subscribers to other Traditional types of performances, and far more (37%) Traditional performance attenders paid less than $100 for their series of tickets. As well as paying more for their subscription series, ballet audiences appear to be getting fewer performances for their money. In all, 38% of ballet audiences report getting four or less performances in their series, compared to 23% of the total audiences for Traditional performance types who report this.

Only 41% report six or more performances compared to 52% among Traditional audiences overall. Put another way, Ballet audiences who subscribe pay, on average, $42 for a performance, while Traditional audiences overall pay $30 per performance.

Unlike those in the ballet audience purchasing single tickets, ballet subscribers are much like other Traditional subscribers. Overall, they display little resistance to an increase in subscription prices, as only 9% say they would discontinue their subscription. Subscribers are, however, clearly divided over how much they are prepared to pay. Close to half (48%) are not prepared to pay more than a 15% increase, while the other half (45%) would pay 10%. This suggests that there is enough flexibility to increasing subscriptions by 5%.

That there is some price flexibility among ballet audiences is further demonstrated by the fact that, while the mean *amount paid* and *prepared to pay* is the same, differences exist between what ballet audiences say they paid for a single ticket and what they say they are prepared to pay. As Table 3 makes clear, while 50% of ballet audiences say they are prepared to pay $20 or more, 58% say they would be prepared to pay above this amount.

As a point of comparison, recent ballet attenders among the general public are somewhat less willing to pay high prices, only 45% say they would pay $20 or more.

The difference in *amount prepared to pay*, between audiences and self-defined recent attenders in the general public, supports the idea that those with more intense involvement are prepared to pay more for a ticket.

This is confirmed for both audiences and general public, when the relationship between *amount prepared to pay* for a dance performance, and frequency and interest in attending more frequently, is considered. Among ballet audiences, those who have attended most frequently are easily the most likely to be prepared to pay more ($29 on average among those who report attending three or more performances during the last complete season). Much the same principle is apparent among recent attenders in the general public. Those who have attended in the last six months, and would like to attend more performances, are considerably more likely to be prepared to pay a higher ticket price for a dance performance.

Table 3

BALLET: AMOUNT PAID FOR PERFORMANCE ATTENDED AND AMOUNT PREPARED TO PAY FOR A BALLET PERFORMANCE

	GIFT	$10- OR LESS	$11- $15	$16- $19	$20- $24	$25- $29	$30- $39	$40- $49	$50- OR MORE	MEAN AM'T	NOTHING/ NOT INTERESTED	NO OPINION
	%	%	%	%	%	%	%	%	%	$	%	%
BALLET AUDIENCE												
Amount paid *	3	6	13	24	16	12	12	4	5	$25	-	5
Amount prepared to pay		6	15	17	25	10	11	7	5	$25	3	3
GENERAL PUBLIC/Ballet attender**												
Amount prepared to pay	-	14	21	11	22	9	6	4	4	$21	7	1

* The categories for the amount paid question are slightly different: Less than $10, $10 - $14, $15 - $19. Thereafter the categories are the same.

** Reported that they attended a ballet performance in the last six months.

2.1.5 DEMOGRAPHICS

The demographic characteristics of ballet audiences suggest some very unique characteristics. Table 4 shows that, in al,l 62% of those surveyed at ballet performances were women. Moreover, those in the audience reporting more frequent attendance are even more likely to be women (75%). Confirmation for this gender split is found among the general public, where those who report attending in the last five years (62%) and in the last six months (66%) are disproportionately female. In terms of age, ballet audiences appear to be older than the population overall.

Among audiences, those attending at least three times in the last season are above average in age, 41% in all are above the age of 55 years. Much the same trend is apparent among the public, where those attending in the last six months are more likely to be 55 years plus than the public overall.

Income and education data suggest that the audiences are little different from audiences for other performance or more frequent attenders. Namely, ballet audiences and recent attenders have higher household incomes and better educations than others in the population. Among the general public it is clear, however, that higher income earners and those with higher levels of education are more likely to report attendance, at least in the last five years.

When life cycle variations are considered, the age relationships noted earlier become much clearer. Among the general public, young singles with no children are much more likely than other life cycle stages to be recent attenders or to have been to a ballet performance in at least the last five years. Fully one-in-three recent attenders are in this category. At the other end of the age spectrum, those in the "empty nest" stage, that is those couples whose children have left home are much more likely than others to be recent attenders, as 29% of all recent attenders fall into these two categories. By the same token young couples with children are much less likely to have attended a performance in the last six months. These results clearly indicate that, at least among the general public, six-in-ten of recent attenders are either young singles without children or older couples with no children at home and singles.

This view is generally confirmed by the audience life cycle data. Those in the audience are either at the beginning of the adult life cycle or in the last two stages.

Moreover, older childless couples and childless singles, as the age data indicates, are much more likely than others to be regular members of the audience, as 41% of those reporting attendance last season, of at least three performances, are in these two final life stages.

Table 4
BALLET: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	BALLET AUDIENCE TOTAL	DID NOT ATTEND	ATTENDED 1/2 TIMES	ATTENDED 3/4 TIMES	GENERAL PUBLIC TOTAL	NEVER ATTENDED	ATTENDED IN LAST 5 YEARS	ATTENDED IN LAST 6 MONTHS
	%	%	%	%	%	%	%	%
GENDER								
Male	37	38	24	23	49	52	38	34
Female	62	60	75	75	51	48	62	66
AGE								
16 - 24 years	18	28	19	13	16	15	17	20
25 - 34 years	15	22	15	12	26	27	24	20
35 - 44 years	21	20	22	20	24	23	25	20
45 - 54 years	16	12	18	14	14	14	12	14
55 - 64 years	14	0	13	19	10	10	10	13
65 years or older	16	18	12	22	10	9	11	14
HOUSEHOLD INCOME								
Less than $10,000	10	26	11	4	7	7	6	7
$10,000 - $19,999	7	3	6	9	14	14	10	0
$20,000 - $29,999	3	0	2	5	18	19	14	14
$30,000 - $39,999	9	12	8	12	17	17	18	14
$40,000 - $49,999	13	15	12	14	18	18	18	13
$50,000 - $59,999	15	9	15	17	11	11	11	18
$60,000 - $74,999	20	12	22	20	8	8	9	8
$75,000 or more	22	23	24	19	8	7	15	16
EDUCATION: Highest level								
Less th. high sch.	4	8	3	3	20	21	7	7
High school diplo.	25	22	26	25	27	29	14	19
College	22	25	22	24	17	17	17	15
Some university	-	-	-	-	7	7	9	10
Bachelor's degree	26	28	26	26	12	11	24	21
Grad/Prof. degree	22	19	22	23	6	5	13	11
Student	-	-	-	-	11	10	16	17
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	25	28	25	24	24	23	28	32
Married, under 45, no child. at home	8	26	8	4	10	11	11	8
Married, under 45, child. present	16	10	19	13	29	31	25	18
Single parent	7	10	6	6	4	4	6	4
Married, 45 and +, child. present	9	8	8	12	9	10	6	9
Married, 45 and +, no child. at home	22	13	20	26	15	15	15	17
Single, 45 and +, no child. at home	12	5	12	15	8	8	9	12

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.2 Contemporary Dance

2.2.1 ATTENDANCE PATTERNS

The proportion of the population who have been exposed to contemporary dance appears to be relatively small, and is similar in size to that for other avant-garde types (i.e., experimental theatre and contemporary classical music). In all, 14% of the public report that they have attended a contemporary dance performance. However, the general public data also suggests that the current audience may be as large as that for ballet; as six percent (6%) of the general public, the same as for ballet, report that they have attended a contemporary dance performance in the last six months. This self-reporting is, however, subject to the interpretation that the public give to contemporary dance, for example, including jazz dance, and this may tend to inflate the proportion attending by an unknown amount. This 6% figure for recent attenders is then an upper limit for the current audience.

At the same time, the core audience may also be smaller than for some other Traditional types of performances, since 22% of the contemporary dance audience surveyed, had not attended a performance during the last complete season. Similarly, only one-in-five of the audience surveyed had attended a contemporary dance performance more than three times in the last season. This may, however, have been a function of the availability of performances than any lack of demand on the part of contemporary dance audiences.

That there is, indeed, a limited audience for contemporary dance is apparent from the interest that audiences show in attending more contemporary dance performances. Among members of the contemporary dance audience, 38% express interest in attending more frequently, at least in terms of making it one of their three choices of a performance type to attend more frequently.

Among other audiences, it is those who attend other types of avant-garde performances whose interest is greatest in contemporary dance, but even among experimental theatre and contemporary classical music audiences, interest is limited: 22% and 23%, respectively, express an interest in attending more frequently. Among the general public, the tendency for those reporting attendance at avant-garde type performances to be the most interested in contemporary dance is also confirmed.

Among ballet audiences, 18% express interest and this suggests some, but again limited, interest. The same trend is apparent among the general public. This suggests that, while contemporary dance audiences may express interest in ballet, the interest is not reciprocated by ballet audiences.

In terms of new audiences beyond those already attending Traditional performances, there is some evidence, at least among the general public, that those reporting jazz and folk music attendance in the last six months have some interest in attending contemporary dance performances. The same can be said of those reporting children's performance and ethnic/heritage performance attendance.

Finally, a further challenge to building an audience is the level of potential interest. Among the public, fully 80% say they have never attended and are not interested in

attending. This, however, does leave 20% of the population who have already attended or would like to attend.

2.2.2 EXPECTATIONS AND PERCEPTIONS

Part of the potential audience for contemporary dance is likely to be connected to the kinds of expectations and preferences that audiences have about dance performances. Some of these preferences and expectations are taken up in Table 1, which shows contemporary dance audience's reaction to a series of agree/disagree statements about dance. These same statements are also analysed in the ballet section of this chapter, in terms of how ballet audiences responded to the same questions.

It is clear from Table 1, that contemporary dance audiences are somewhat different from ballet audiences, and from Traditional audiences overall, in their preferences regarding dance. To start with, while live music is important for this audience, they are far less interested in live music, than ballet audiences or audiences overall. Live music was one of the major preferences of ballet audiences, as well as traditional audiences generally when thinking about dance. Similarly, while interested in the skill of the dancers, this is also less of an issue for contemporary dance audiences, relative to ballet audiences.

Contemporary dance audiences, however, are more interested than ballet audiences in performances that offer new experiences and that feature innovation. Similarly, they are less interested than ballet audiences in performances that are well known, although half appear to like the familiar.

In sum, contemporary dance audiences appear to value a number of things about a performance. These are displays of dance skill that are set in the context of new and innovative performances, but which, at the same time have some known elements with which they are familiar. That there be a story line that can be followed is not of great significance. It is the experience of the new and the exploration that appears to be important for the contemporary dance audience. Live music is of some importance, but is secondary to the performance.

Consistent with their somewhat different focus from audiences, generally, and ballet audiences, in particular, regarding dance performances, contemporary dance audiences are also somewhat different in their broader expectations of performing arts overall. For contemporary dance audiences, that a performance has a strong emotional impact receives the highest level of endorsement, as over half (57%) make this one of their three expectations from a performance. In addition, and unlike most other Traditional audiences, contemporary dance audiences are well above the average traditional audience in expecting that a performance will provide insight into who they are. Although still concerned about performances, that allow them to forget their problems and make them feel good, these expectations are well below the average for Traditional performing arts audiences overall. But like other audiences, the expectation that a performance should be about social issues or about real people facing real life situations is limited. Presumably, the desire is for an abstract depiction of situations, but one that focuses on the emotional life of people and provides opportunities for reflection on the interior life of the individual.

Table 1
CONTEMPORARY DANCE AUDIENCE: STATEMENTS ABOUT DANCE

	Agree strongly	Agree somewhat	Agree/ Disagree slightly	Somewhat Disagree	Strongly Disagree	No opinion
Prefer performance with live music	%	%	%	%	%	%
Total audience	46	27	18	2	1	5
Traditional audience	46	27	18	2	1	5
Ballet audience	51	27	18	2	1	2
Contemporary dance	34	27	29	6	2	2
Prefer performances that offer a new experience						
Total audience	32	31	26	3	2	6
Traditional audience	32	31	26	4	1	6
Ballet audience	36	30	22	6	2	3
Contemporary dance	46	32	16	3	1	2
Like to see pieces that display shield and talent of dancer						
Total audience	45	28	18	2	2	6
Traditional audience	45	28	17	3	2	6
Ballet audience	61	24	11	1	0	2
Contemporary dance	48	28	16	3	2	2
Prefer performances that have interesting and attractive sets						
Total audience	23	31	31	6	3	6
Traditional audience	22	29	33	6	3	6
Ballet audience	29	31	31	5	3	2
Contemporary dance	20	27	36	10	5	2
Prefer performances that have a story that you can follow						
Total audience	22	30	30	8	5	6
Traditional audience	20	29	31	9	5	6
Ballet audience	24	28	32	11	4	2
Contemporary dance	16	28	35	12	8	2
Like innovative and contemporary dance performances						
Total audience	22	24	33	9	7	6
Traditional audience	22	23	32	9	7	6
Ballet audience	24	24	36	5	8	2
Contemporary dance	44	25	22	4	4	2
Don't like to go to performances of pieces that are well known						
Total audience	5	7	30	24	28	6
Traditional audience	5	7	28	24	30	6
Ballet audience	5	6	22	23	41	2
Contemporary dance	5	7	34	25	25	3

2.2.3 TICKET PURCHASING AND SUBSCRIPTION ISSUES

In their ticket purchasing habits, contemporary dance audiences are even more likely than other traditional performing arts audiences to purchase their tickets in person, and more specifically, in person at the box office. Possibly, other ticket outlets do not handle contemporary dance performances to the same extent that they do other traditional performing arts types. As with other audiences, however, many in the contemporary dance audience would prefer to purchase tickets by phone at the box office.

Relative to some of the mainstream types, only a quarter (26%) of the audiences surveyed at a contemporary dance performance were subscribers. This figure is, however, only slightly below the proportion subscribing to ballet (32%). Part of the reason for the relatively low subscription rate is that half (52%) of those with an opinion on the issue reported that subscription tickets are not available for the performance they attended. Another factor is that many (69%) in the contemporary dance audience are not interested in subscribing generally, while few (37%) currently subscribe to a performance type of some type.

2.2.4 PRICING ISSUES

Relative to other traditional performance types, contemporary dance audiences paid lower prices for their single tickets. As Table 3 points out, the mean amount paid was $18. Table 2 demonstrates that, in all, 40% of contemporary dance audiences paid less than $15, compared to 28% paying this among traditional performing arts audiences overall. At the same time, almost none paid more than $30. Despite the relatively lower prices, Table 2 also shows that a significant proportion of the audience surveyed is prepared to pay more for a ticket. In all, three quarters (76%) are prepared to pay at least another $2, while 49% would pay up to $4 more.

As noted above, only a quarter of the audience had subscription tickets for the performance attended. Among those in the contemporary dance audience who had a subscription for the performance, the price paid is well below the average for all types of Traditional performances: $102 versus $159. In fact, as Table 2 shows, 61% paid below $100, compared to 39% for all types of Traditional performances. In part, this lower price is a result of the number of performances being slightly lower than for other Traditional types. Only 31% of the audience surveyed had six or more performances in their contemporary dance subscription compared to 52% saying this for Traditional types overall. The average price per performance in a subscription package is approximately $20.

As with increasing ticket prices, there appears to be some flexibility to increase subscriptions by five percent. Nearly all (92%) of those with an opinion, say that they would be prepared to pay a 5% increase in subscription prices. Fifty-five percent (55%) say they would pay 10% more. The willingness to pay more is, however, thrown into question by the results shown on Table 3. When the amount audiences surveyed say they paid and what they are prepared to pay are compared, results are quite close. Audiences appear on average to be prepared to pay one dollar more, $19 compared to $18. However, the question on maximum amount prepared to pay mentioned dance only rather than contemporary dance and this may have influenced responses.

Table 2
CONTEMPORARY DANCE AUDIENCE: TICKET AND SUBSCRIPTION PRICE ISSUES

	CONT. DANCE AUDIENCE %	TOTAL CONT. DANCE AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	12	9	10
$10 - $14	28	19	18
$15 - $19	28	25	21
$20 - $24	8	17	15
$25 - $29	14	9	9
$30 - $34	0	4	5
$35 - $39	0	2	3
$40 - $49	0	3	3
$50 - $74	1	2	4
$75 or more	0	1	2
Gift	3	4	4
No Opinion	4	6	6
Mean amount	$18	$21	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	27	27	28
$4.00 higher	22	22	21
$6.00 higher	11	10	10
$10.00 higher	16	14	14
NOT ATTEND IF ANY HIGHER:	17	16	17
No opinion	8	11	10
AMOUNT PAID FOR YEAR'S SUBSCRIPTION:			
Less than $50	32	13	15
$50 - $99	29	26	22
$100 - $199	24	30	30
$200 - $299	11	15	14
$300 - $399	1	7	6
$400 or more	3	7	6
No opinion	17	18	19
Mean amount	$102	$159	$151
NUMBER OF PERFORMANCES IN SUBSCRIPTION:			
3 performances	15	7	8
4 performances	12	16	17
5 performances	41	23	25
6 or more performances	31	52	50
No opinion	25	27	28
CONTINUE WITH SUBSCRIPTION IF PRICES INCREASED BY:			
5%	38	42	43
10%	27	26	26
15%	28	22	23
Would discontinue	8	9	9
No opinion	13	15	16

*Those questions with *no opinion* above 10% have been recalculated to exclude the *no opinions*.

Table 3
CONTEMPORARY DANCE AUDIENCE: AMOUNT PAID FOR PERFORMANCE ATTENDED AND AMOUNT PREPARED TO PAY FOR A DANCE PERFORMANCE

	GIFT	$10- OR LESS	$11- $15	$16- $19	$20- $24	$25- $29	$30- $39	$40- $49	$50- OR MORE	MEAN AMOUNT	NOTHING/ NOT INTERESTED	NO OPINION
	%	%	%	%	%	%	%	%	$	%	%	%
CONT. DANCE AUDIENCE												
Amount paid *	3	12	28	28	8	14	0	0	1	$18	-	4
Amount prepared to pay	-	14	24	20	24	6	4	3	1	$19	2	3
GENERAL PUBLIC**/Cont. dance attender												
Amount prepared to pay	-	26	24	11	16	7	4	3	2	$17	4	2

* The categories for the amount paid question are slightly different: Less than $10, $10 - $14, $15 - $19. Thereafter the categories are the same.

** Reported that they attended a contemporary dance performance in the last six months.

At the same time, Table 3 also shows that recent attenders among the public are prepared to pay on average $17 for a single ticket.

The fact that these averages appear low may simply be a reflection of the fact that contemporary dance audiences are not used to paying higher prices. Although, as noted above, when asked if they would be prepared to pay a fixed dollar amount more there is some evidence that they would.

2.2.5 DEMOGRAPHICS

As in the case of ballet, the core audience for contemporary dance appears to be disproportionately female. In all, 66% of the audience surveyed at performances were female, while 58% of the general public reporting attending a contemporary dance performance in the last six months were female (see Table 4).

Unlike ballet audiences, the audience for contemporary dance appears to be unusually young. In all, 51% are below the age of 35 years, while 50% of recent attenders among the general public are this age. This is confirmed by the life cycle results, which indicate that four-in-ten of audiences are young singles. Correspondingly, few (15%) in the contemporary dance audience are 55 years or older.

Not unexpectedly, the largest life cycle group in the population, young married couples with children, are well below average in attending contemporary dance performances, as they are almost all performance types. That this is a function of their raising a family is evident from the fact that they are much more likely to report having attended in the last five years, than in the last six months, 28% compared to 20%.

The relative youth of the contemporary dance audience also likely accounts for their limited household income. Fully a quarter (26%) report household incomes of less than $20,000. This likely is a significant factor influencing their preparedness to pay more for a dance performance. Another factor limiting this audiences' income, and hence their

ability to pay higher ticket prices, is that, according to the general public data, 19% of recent attenders are students.

Finally, consistent with other Traditional performing arts audiences, this audience are relatively well educated, close to half have a university degree, and another quarter a college education.

Table 4
CONTEMPORARY DANCE: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	CONT. DANCE AUDIENCE TOTAL	DID NOT ATTEND	ATTENDED 1/2 TIMES	ATTENDED 3/4 TIMES	GENERAL PUBLIC TOTAL	NEVER ATTENDED	ATTENDED IN LAST 5 YEARS	ATTENDED IN LAST 6 MONTHS
	%	%	%	%	%	%	%	%
GENDER								
Male	34	29	33	41	49	50	40	42
Female	66	70	67	58	51	50	60	58
AGE								
16 - 24 years	20	14	24	17	16	15	16	26
25 - 34 years	31	26	32	33	26	26	27	24
35 - 44 years	21	20	19	28	24	23	28	23
45 - 54 years	12	13	12	13	14	14	14	13
55 - 64 years	9	17	8	4	10	11	9	7
65 years or older	6	10	5	5	10	10	7	7
HOUSEHOLD INCOME								
Less than $10,000	14	10	16	12	7	7	4	4
$10,000 - $19,999	12	21	9	10	14	14	9	8
$20,000 - $29,999	2	4	1	4	18	18	16	19
$30,000 - $39,999	17	13	19	16	17	17	14	14
$40,000 - $49,999	14	19	10	18	18	17	20	18
$50,000 - $59,999	11	9	13	9	11	11	12	12
$60,000 - $74,999	14	12	15	14	8	8	10	11
$75,000 or more	16	12	16	17	8	7	15	14
EDUCATION: Highest level								
Less th. high sch.	3	7	3	0	20	25	9	7
High school diplo.	25	30	26	18	27	32	20	18
College	23	21	22	26	17	17	20	15
Some university	-	-	-	-	7	6	9	11
Bachelor's degree	26	19	27	30	12	8	18	20
Grad/Prof. degree	21	21	20	23	6	3	9	11
Student	-	-	-	-	11	8	14	19
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	41	29	41	55	24	22	27	38
Married, under 45, no child. at home	10	6	12	6	10	10	11	11
Married, under 45, child. present	15	16	15	12	29	30	28	20
Single parent	9	13	8	8	4	4	6	6
Married, 45 and +, child. present	7	16	6	3	9	9	8	9
Married, 45 and +, no child. at home	7	12	6	5	15	15	15	10
Single, 45 and +, no child. at home	10	7	12	10	8	9	6	6

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.3 Theatre-Drama

2.3.1 Attendance Patterns

As previously noted in the overview, while attendance among the general public at most types of Traditional performing arts is quite limited, the exception is theatre, with approximately one quarter (24%) of Canadians reporting that they have attended specifically theatre-drama (henceforth referred to as drama) in the last six months. An additional 16% report having attended in the last five years. A slightly lower proportion, relative to other Traditional performing arts, of six-in-ten (60%) say they have never attended drama.

In terms of those who constitute the current audience, attendance is quite frequent, especially relative to the other Traditional performing arts. To illustrate, as many as four-in-ten (40%) drama audiences surveyed report having attended a production at least three times in the last complete season. Just under half (46%) recall attending a drama production once or twice in the last complete season.

Interest in attending drama performances more frequently is quite high among both the general population and drama audiences. To demonstrate, nearly four-in-ten (37%) among the general public indicate an interest in attending theatre performances more frequently, which is among the highest proportions of all the Traditional performing arts. Interest is somewhat higher among those who have attended in the last five years or never (22%) compared with those who attended in the last six months (15%). A similar proportion of four-in-ten (40%) drama audiences surveyed indicate an interest in attending performances of this type more frequently. Interest is equally high among those who attended at least three performances in the last complete season (18%), and those who attended once or twice (18%). Very few (4%) of those who report not having attended a performance of drama in the last season indicate an interest in attending more.

Audiences from other Traditional performing arts may present an opportunity to broaden the audience base for drama. Interest in attending drama is highest among audiences attending other types of theatre, namely theatre-comedy (33%) and avant-garde theatre (32%). Somewhat smaller proportions, though still noteworthy, of audiences of ballet (25%), contemporary dance (25%) and opera (24%) express an interest in attending drama more frequently.

Among the general public who have attended a type of Traditional performance in the last six months, interest in attending drama is quite high. In fact, only in the instance of those who attended symphonic "pops" in the last six months, does this proportion drop below half (46%). Recent attenders of chamber/soloists (57%), avant-garde theatre (56%), and symphonic music (55%) are among the most likely to express an interest in attending drama more frequently.

2.3.2 EXPECTATIONS AND PERCEPTIONS

Expectations among audiences of drama are not that defined. Respondents were presented with five statements pertaining to theatre, and asked to indicate the extent to which they agree or disagree with each. As indicated in Table 1, with the exception of attitudes toward sitting through a performance, over four-in-ten consistently indicate that they agree or disagree "slightly," suggesting some ambivalence towards each of the statements regarding performance preferences. That is, there is clearly a lack of intensity in attitudes toward any of the statements presented.

As indicated in the same table, a significant minority of over four-in-ten (43%) drama audiences agree at least somewhat, that they "...prefer to see plays that deal with contemporary social issues and problems." In fact, a higher proportion of drama audiences agree with this statement compared with audiences overall, or audiences of traditional performances. Further, more frequent attenders among the drama audience "strongly" agree with this statement (18% compared to 9%).

Drama audiences appear to place higher importance on plays by Canadian playwrights, compared with audiences overall. Drama audiences (37%) are more likely than audiences overall (28%) to agree that they identify with plays written by Canadian playwrights. One third (33%) of drama audiences agree that they "...usually like to see plays that are classics that have been around for years." However, 46% indicate that they agree or disagree "slightly," suggesting no strong opinion either way.

Just over one quarter (27%) of drama audiences agree that they prefer to attend plays that star well known performers. However, half (50%) indicate no definitive opinion, and nearly one quarter (22%) in fact disagree. Interestingly, drama audiences, who did not attend a performance in the last season are more likely than others to indicate a preference for plays that feature well known performers (37%).

The length of time of a performance does not appear to present a barrier to audiences. The vast majority of audiences (67%), and even more so, drama audiences (72%), disagree that they find it difficult to sit for two or three hours at a show or performance. Further, nearly six-in-ten (57%) of those who report having attended three or four times in the last season, say they "strongly" disagree. Only one-in-ten (10%) agree among all audience types shown in Table 1.

In sum, the responses to the agree/disagree statements suggest that there is no strong consensus among drama audiences in terms of the types of plays they like. But there is some resistance to both the "classics" and plays dealing with social issues or problems.

This apparent resistance on the part of many in the drama audience to the classics and themes that deal with social issues is reflected in their expectations of a performance. In examining the expectations audiences have regarding theatre performances, "allowing you to forget your problems" (53%), "making you feel good" (50%), and "having a strong emotional impact" (54%) emerge as the top three expectations drama audiences have in attending theatre performances. Roughly one third expect the performance to "provide insight into who you are" (34%) and "be about real people facing real life situations" (32%).

Table 1
THEATRE - DRAMA AUDIENCE: STATEMENTS ABOUT THEATRE

	Agree strongly	Agree somewhat	Agree/ Disagree slightly	Somewhat Disagree	Strongly Disagree	No opinion
Like to see plays that are classic	%	%	%	%	%	%
Total audience	12	24	44	12	6	3
Traditional audience	12	24	44	12	5	3
Theatre-drama audience	9	24	46	13	6	1
Prefer to see plays that deal with social issues/problems						
Total audience	10	25	44	10	6	4
Traditional audience	11	25	44	10	6	4
Theatre-drama audience	13	30	43	8	4	1
Identify with plays written by Canadian playwright						
Total audience	9	19	45	14	9	4
Traditional audience	9	19	45	14	9	4
Theatre-drama audience	13	24	45	9	8	2
Prefer to attend plays that star well known performers						
Total audience	10	20	44	13	9	3
Traditional audience	10	21	44	13	9	3
Theatre-drama audience	7	20	50	13	9	1
Find it difficult to sit for 2 or 3 hours at a show or performance						
Total audience	4	6	20	19	48	3
Traditional audience	4	6	18	18	50	3
Theatre-drama audience	4	6	17	22	50	1

Among the general public, the expectation that the drama performance be "entertaining" (49%) receives highest mention followed by "allowing you to forget problems" (46%) and "making you feel good" (43%). While "having a strong emotional impact" is cited by over half of drama audiences, as one of their expectations, a much smaller proportion of the general public cite this (27%).

2.3.3 Ticket Purchasing and Subscription Issues

In their ticket purchasing habits, drama audiences appear to have few differences from other audiences with one noticeable exception. Drama audiences are significantly more likely than audiences overall to purchase their ticket by telephone at the box office (38%).

Not only do a significant proportion of the drama audience report holding subscription tickets, but further, a majority (52%) indicate that they prefer this method of obtaining tickets. Similar to proportions of other Traditional performing arts, nearly three quarters (74%) of drama audiences say they have been contacted regarding subscription tickets. Less than one-in-five say they do not subscribe now, but have in the past, and approximately one quarter (25%) have never subscribed.

2.3.4 PRICING ISSUES

Similar proportions of drama audiences (30%) report paying less than fifteen dollars for a single ticket, compared with Traditional performing arts audiences (28%) and audiences in general (28%) (see Table 2). Further, while the proportion of drama audiences (10%) that report paying thirty dollars or more for a single ticket resembles that of Traditional performances (12%), it is somewhat lower than audiences overall (17%).

When the amount drama audiences are prepared to pay for a single ticket for drama is considered, it is apparent from Table 2 that the optimal price increase is $2. In all, 73% of drama audiences say they would be prepared to pay an additional $2 for a single ticket.

Consistent with the potential to raise drama single ticket prices somewhat, the amount drama audiences are prepared to pay for a single ticket, as shown in Table 3, differs somewhat from the amount they are already paying. The average moves from twenty dollars to twenty-two dollars. However, while this may not seem great, the data does suggest some price flexibility among drama audiences. While one third (33%) of drama audiences say they paid at least $20 for a single ticket, nearly half (46%) say they would be prepared to pay above this amount.

Interestingly, among the general public, one third (33%) say they would be prepared to pay $20 or more for a single ticket.

As previously noted, nearly half (46%) of drama audiences reportedly hold subscription tickets for the performance surveyed. Comparable with audiences overall (45%), a higher proportion of drama audiences (45%) report paying less than one hundred dollars for a year's subscription, compared with Traditional performance audiences overall (32%). The mean amount paid is $109 compared to $159 for Traditional audiences overall. Compared with Traditional audiences (52%) and audiences overall (50%), slightly fewer drama audiences (41%) indicate that the subscription included six or more performances. Similar to audience's responses, just over one-in-five say their subscription includes three or four performances.

In terms of acceptable increases to the price of a subscription, the attitudes of drama audiences reflect those of other Traditional audiences and further, audiences overall.

That is, the vast majority would be willing to accept a five percent increase (91%) and half would accept a ten percent (50%) increase at most. Just over one-in-five (21%) would accept an increase of fifteen percent. Few (9%) indicate that they would discontinue their subscription.

Among drama audiences and the general public alike, those who attend more frequently are willing to pay slightly more for the price of a single ticket, though this difference is not always that great. For example, among the general public, those who report having attended a drama performance in the last six months, and express an interest in attending more frequently, the average amount they would be prepared to pay is $22, which is greater than the amount those who have "never" attended report being prepared to pay (where the average amount is $16), and greater than the amount those who have attended in the last five years (where the average amount is $19) say they are prepared to pay.

Table 2
THEATRE -DRAMA AUDIENCE: TICKET AND SUBSCRIPTION PRICE ISSUES

	THEATRE DRAMA AUDIENCE %	TOTAL TRADITIONAL AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	9	9	10
$10 - $14	21	19	18
$15 - $19	26	25	21
$20 - $24	17	17	15
$25 - $29	6	9	9
$30 - $34	3	4	5
$35 - $39	4	2	3
$40 - $49	1	3	3
$50 - $74	2	2	4
$75 or more	1	1	2
Gift	4	4	4
No Opinion	6	6	6
Mean amount	$20	$21	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	27	27	28
$4.00 higher	22	22	21
$6.00 higher	11	10	10
$10.00 higher	13	14	14
NOT ATTEND IF ANY HIGHER:	15	16	17
No opinion	12	11	10
AMOUNT PAID FOR YEAR'S SUBSCRIPTION: *			
Less than $50	17	13	15
$50 - $99	38	26	28
$100 - $199	32	30	30
$200 - $299	8	15	14
$300 - $399	2	7	6
$400 or more	2	7	6
No opinion	18	18	19
Mean amount	$109	$159	$151
NUMBER OF PERFORMANCES IN SUBSCRIPTION: *			
3 performances	8	7	8
4 performances	16	16	17
5 performances	36	23	25
6 or more performances	41	52	50
No opinion	24	27	28
CONTINUE WITH SUBSCRIPTION IF PRICES INCREASED BY: (LARGEST INCREASED PREPARED TO BUY) *			
5%	41	42	43
10%	29	26	26
15%	21	22	23
Would discontinue	9	9	9
No opinion	13	15	16

Note: Responses have been recalculated where *no opinion* exceeds 10%.

Table 3

THEATRE-DRAMA: AMOUNT PAID FOR PERFORMANCE ATTENDED AND AMOUNT PREPARED TO PAY FOR A THEATRE PERFORMANCE

	GIFT	$10- OR LESS	$11- $15	$16- $19	$20- $24	$25- $29	$30- $39	$40- $49	$50-OR MORE	MEAN AMT	NOTHING/ NOT INTERESTED	NO OPINION
	%	%	%	%	%	%	%	%	%	$	%	%
THEATRE-DRAMA AUDIENCE												
Amount paid *	4	9	21	26	17	6	7	1	2	$20	-	6
Amount prepared to pay	-	6	25	18	28	6	6	3	3	$22	*	4
GENERAL PUBLIC/Theatre - drama Attender**												
Amount prepared to pay	-	20	21	12	15	8	5	2	3	$19	9	4

* The categories for the amount paid question are slightly different: Less than $10, $10 - $14, $15 - $19. Thereafter the categories are the same.

** Reported that they attended a theatre-drama performance in the last six months.

Among the audiences, the average amount drama audiences are prepared to pay for a single ticket to a theatre performance is only $3 higher among most frequent attenders compared with those who have attended once or twice in the past season, or those who did not attend at all.

2.3.5 DEMOGRAPHICS

The demographic characteristics of drama audiences suggest some variations from the norm. The demographics of the drama attenders suggest a higher representation of women, among both drama audiences, and though to a lesser extent, the general public. Although this does not hold true for the general public, a larger proportion of seniors in the audience sample report attending drama three or four times in the last season. Further, a higher proportion of those in the audience report annual household incomes in excess of $75,000, compared with those in the general public.

With respect to life cycle, and consistent with the reported relationship between attendance and age just noted, a higher proportion of those members of the audience forty-five years of age and over, regardless of their marital status or presence of children, report the highest frequency of attendance in the last season.

Conversely, among the general public, a higher proportion of those who are single, under forty-five years old with no children living at home report attending a drama performance in the past six months, compared with other life cycle categories. Among the general public, those who are under forty-five years old, married and with children, are less likely to attend than their share of the population would suggest. This simply indicates life cycle realities of raising a family and consequently having less available free time and discretionary income..

Table 4
THEATRE-DRAMA: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	DRAMA AUDIENCE TOTAL %	DID NOT ATTEND %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %	GENERAL PUBLIC TOTAL %	NEVER ATTENDED %	ATTENDED IN LAST 5 YEARS %	ATTENDED IN LAST 6 MONTHS %
GENDER								
Male	39	35	42	37	46	52	43	46
Female	60	65	58	61	52	48	57	54
AGE								
16 - 24 years	15	17	18	11	16	13	19	21
25 - 34 years	19	14	26	12	26	29	25	20
35 - 44 years	16	16	19	13	24	23	27	22
45 - 54 years	18	14	19	17	14	13	13	15
55 - 64 years	14	15	10	17	10	10	9	11
65 years or older	19	25	8	29	10	11	6	10
HOUSEHOLD INCOME								
Less than $10,000	8	6	10	6	7	8	5	6
$10,000 - $19,999	9	13	6	12	14	16	10	9
$20,000 - $29,999	2	1	1	5	18	21	15	14
$30,000 - $39,999	11	14	11	11	17	17	17	15
$40,000 - $49,999	13	14	14	12	17	17	17	19
$50,000 - $59,999	14	18	12	15	11	10	15	12
$60,000 - $74,999	11	16	22	17	8	7	9	10
$75,000 or more	20	18	23	22	8	5	12	15
EDUCATION: Highest level								
Less th. high sch.	4	4	4	3	18	25	9	7
High school diplo.	25	35	24	24	27	32	20	18
College	20	19	19	20	17	17	20	15
Some university	-	-	-	-	8	6	9	11
Bachelor's degree	30	22	34	27	13	8	18	20
Grad/Prof. degree	21	17	19	25	6	3	9	11
Student	-	-	-	-	12	8	14	19
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	24	21	29	20	24	20	26	31
Married, under 45, no child. at home	12	9	15	10	10	10	13	8
Married, under 45, child. present	10	14	12	5	29	32	29	21
Single parent	6	3	7	5	4	4	4	5
Married, 45 and +, child. present	11	10	10	13	9	9	8	10
Married, 45 and +, no child. at home	21	27	18	24	15	15	13	16
Single, 45 and +, no child. at home	16	16	9	24	8	9	6	9

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.4 Theatre-Comedy

2.4.1 ATTENDANCE PATTERNS

Similar to attendance patterns of drama, over one quarter (27%) of Canadians report having attended a production of theatre-comedy at a theatre in the past six months. Further, one-in-five (20%) Canadians report having attended at least once in the last five years. Only a slim majority (53%) say they have "never" attended a production. This is the lowest proportion of non-attendance of any of the Traditional performing arts.

Among the theatre-comedy audiences surveyed, just over one quarter (26%) report attendance at theatre-comedy performances of three times or more in the last season. While just over half (53%) say they attended only once or twice in the last season, a smaller proportion of approximately one-in-five (21%) say they did not attend a performance in the last season.

Interest among Canadians in attending performances of theatre-comedy more frequently is high with just under half (45%) the general public expressing some interest. Stronger interest, however, is reported from those who have attended in the last five years, or have never attended, than from more frequent attenders (27% compared to 18%).

Mirroring findings from the general public survey, a significant minority (41%) of theatre-comedy audiences surveyed express an interest in attending performances more frequently. Again, similar to the general public, interest in attending more is higher among infrequent attenders. While only just over one-in-ten (12%) of those who recall attending a theatre-comedy performance three or four times in the last season express an interest in more frequent attendance, nearly one quarter (23%) of those who attended once or twice in the last season indicate an interest. Those who did not attend a performance in the last season indicate the lowest level of interest (9%) among audiences.

Interest in attending theatre-comedy performances is particularly high among drama audiences. Approximately half (49%) of drama audiences indicate an interest in attending theatre-comedy. Interest among other audience types is also high, though to a lesser extent, among experimental theatre (31%) and ballet (30%) audiences.

Interest in attending theatre-comedy more frequently is quite high among those who attended a Traditional performance in the last six months. Among this group of general public attenders, over half of those who attended any of the Traditional performance types in the last six months indicate some interest in attending theatre-comedy more frequently. More specifically, higher proportions of those who attended drama (60%), experimental theatre (60%), choral music (57%) and contemporary dance (56%) indicate an interest in attending theatre-comedy more frequently.

2.4.2 EXPECTATIONS AND PERCEPTIONS

The attitudes and preferences of theatre-comedy audiences closely resemble those of drama audiences. As illustrated in Table 1, audiences of theatre-comedy are slightly less likely than audiences overall, or of the Traditional performing arts, to indicate a preference for plays that are classic and have been around for years (30%, 36% and 36%, respectively). However, just under half (45%) indicate that they either agree or disagree "slightly" suggesting that a significant proportion of theatre-comedy audiences simply do not hold a strong opinion one way or the other.

As Table 1 indicates, comedy audiences reveal a stronger preference for plays that deal with social issues and problems, than either of the other two theatre audiences types. Similar to attitudes of audiences of Traditional performing arts, and of audiences overall, three-in-ten theatre-comedy audiences agree at least somewhat, that they prefer to attend plays that star well known performers. Interestingly however, a slightly higher proportion of theatre-comedy audiences disagree (28%), compared with either Traditional performing arts audiences (22%) or audiences overall (22%). Finally, audiences of theatre-comedy (74%) are more likely to disagree that they "...find it difficult to sit for two or three hours at a show or performance", than Traditional performing arts audiences (68%) or audiences overall (67%).

Resembling attitudes of drama audiences, at least half of theatre-comedy audiences expect a performance to "allow you to forget your problems" (55%), "make you feel good" (52%) and "have a strong emotional impact" (50%). Just over one third (34%) further expect a performance to "provide insight into who you are". While significant minorities agree that they prefer plays that deal with contemporary social issues, and identify with plays written by Canadian playwrights, less than three-in-ten (27%) say they expect a performance to be about social issues, and less than one-in-five (15%) expect the performance to be performed by Canadian artists.

Among the general public, the expectation that the performance be entertaining, is cited by just under half (49%) of those who attend theatre-comedy. Similar to the audience sample, and receiving mention by over four-in-ten, are expectations of "allowing you to forget your problems" (46%) and "making you feel good" (43%).

2.4.3 TICKET PURCHASING AND SUBSCRIPTION ISSUES

Similar to drama audiences, a higher proportion of theatre-comedy audiences, relative to Traditional audiences overall, report purchasing tickets by telephone through the box office (33%). A notably lower proportion report purchasing tickets in person, at the box office (29%). In fact, this proportion is the lowest of all Traditional performing arts.

Relative to the other mainstream Traditional performing arts, theatre-comedy audiences are less likely to be subscribers to either theatre-comedy (27%) or any other types of performances (39%). These are among the lowest subscription rates for Traditional arts performance types.

Table 1
THEATRE-COMEDY: STATEMENTS ABOUT THEATRE

	Agree strongly	Agree somewhat	Agree/ Disagree slightly	Somewhat Disagree	Strongly Disagree	No opinion
Like to see plays that are classic						
Total audience	12	24	44	12	6	3
Traditional audience	12	24	44	12	5	3
Theatre-comedy audience	9	21	45	14	8	1
Prefer to see plays that deal with social issues/problems						
Total audience	10	25	44	10	6	4
Traditional audience	11	25	44	10	6	4
Theatre-comedy audience	13	30	45	7	4	1
Identify with plays written by Canadian playwright						
Total audience	9	19	45	14	9	-
Traditional audience	9	19	45	14	9	-
Theatre-comedy audience	12	23	38	15	9	2
Prefer to attend plays that star well known performers						
Total audience	10	20	44	13	9	4
Traditional audience	10	21	44	13	9	4
Theatre-comedy audience	11	19	41	16	12	2
Find it difficult to sit for 2 or 3 hours at a show or performance						
Total audience	4	6	20	19	48	3
Traditional audience	4	6	18	18	50	3
Theatre-comedy audience	4	4	16	19	55	1

2.4.4 Pricing Issues

The average amount theatre-comedy audiences paid for a single ticket closely reflects the average amount paid by audiences overall. However, relative to other types of Traditional performances, theatre-comedy audiences paid, on average, slightly more for their tickets ($24 compared to $21). The data indicates that a higher proportion of theatre-comedy audiences report paying at least thirty dollars for the price of a single ticket, compared with audiences of other Traditional performance types (18% compared to 12%).

In terms of price flexibility, only one-in-five (20%) indicate that they would attend if the price of the ticket was six or ten dollars higher. Similar to attitudes of other Traditional performing audiences, half of theatre-comedy audiences say they would attend if the price of a single ticket was four dollars higher while 70% indicate they would attend if tickets were two dollars higher. Further, close to one-in-five (18%) say they would in fact not attend if the price was any higher (see Table 2).

Suggesting some price flexibility among theatre-comedy audiences, over half (56%) say they would be willing to pay twenty dollars or more for a single ticket, compared to less than half (45%) who actually paid this amount. In comparison with recent attenders of

Table 2
THEATRE-COMEDY AUDIENCE: TICKET AND SUBSCRIPTION PRICE ISSUES

	THEATRE-COMEDY AUDIENCE %	TOTAL TRADITIONAL AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	4	9	10
$10 - $14	14	19	18
$15 - $19	28	25	21
$20 - $24	16	17	15
$25 - $29	10	9	9
$30 - $34	6	4	5
$35 - $39	1	2	3
$40 - $49	8	3	3
$50 - $74	2	2	4
$75 or more	1	1	2
Gift	2	4	4
No Opinion	6	6	6
Mean amount	$24	$21	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	28	27	28
$4.00 higher	22	22	21
$6.00 higher	8	10	10
$10.00 higher	12	14	14
NOT ATTEND IF ANY HIGHER:	18	16	17
No opinion	12	11	10
AMOUNT PAID FOR YEAR'S SUBSCRIPTION:*			
Less than $50	16	11	12
$50 - $99	20	21	23
$100 - $199	20	25	24
$200 - $299	20	12	11
$300 - $399	71	6	5
$400 or more	10	6	5
No opinion	16	18	19
Mean amount	$175	$159	$151
NUMBER OF PERFORMANCES IN SUBSCRIPTION:*			
3 performances	6	5	6
4 performances	22	12	12
5 performances	28	17	18
6 or more performances	44	38	36
No opinion	29	27	28
CONTINUE WITH SUBSCRIPTION IF PRICES INCREASED BY: (LARGEST INCREASED PREPARED TO BUY) *			
5%	47	36	36
10%	20	22	22
15%	24	19	19
Would discontinue	11	8	8
No opinion	14	15	16

NOTE: Responses have been recalculated to exclude *no opinions*, when *no opinion* exceed 10%.

theatre-comedy among the general public, slightly fewer say they would be willing to pay twenty dollars or more for a single ticket to theatre-comedy (52%), though this difference in not that great.

The amount theatre-comedy audiences are prepared to pay for a single ticket to a theatre performance, does not vary greatly by level of attendance, or interest. Even among the general public, there is very little difference between frequent attenders, and those that have not attended, in the average amount prepared to pay.

As previously noted, just over one quarter of theatre-comedy audiences report holding subscription tickets to the performance surveyed. The amount paid for the subscription, as shown in Table 2, is somewhat higher, than other audiences of the Traditional performing arts paid. For example, a higher proportion of audiences to the Traditional performing arts overall, paid under two hundred dollars for subscription tickets compared with theatre-comedy audiences. Similar to other subscriptions, well over half (72%) of theatre-comedy audiences indicate that their subscription included at least five performances. Almost all theatre-comedy audiences holding subscriptions would be willing to continue their subscription if prices increased by only five percent (91%)and a majority (55%) say they would continue to subscribe if prices increased by ten percent at most. However, approximately one-in-ten (11%) say they would discontinue their subscription if the price increased. This closely resembles findings from other audience types.

Table 3

THEATRE-COMEDY AUDIENCE: AMOUNT PAID FOR PERFORMANCE ATTENDED AND AMOUNT PREPARED TO PAY FOR A THEATRE PERFORMANCE

	GIFT	$10- OR LESS	$11- $15	$16- $19	$20- $24	$25- $29	$30- $39	$40- $49	$50-OR MORE	MEAN AM'T	NOTHING/ NOT INTERESTED	NO OPINION
	%	%	%	%	%	%	%	%	%	$	%	%
THEATRE-COMEDY AUDIENCE												
Amount paid *	2	4	14	28	17	10	8	8	2	$24	-	6
Amount prepared to pay	-	7	20	16	27	9	5	5	5	$23	1	5
GENERAL PUBLIC**/Theatre -comedy attender												
Amount prepared to pay	-	20	21	12	15	8	5	2	3	$19	9	4

* The categories for the amount paid question are slightly different: Less than $10, $10 - $14, $15 - $19. Thereafter the categories are the same.

** Reported that they attended a theatre-comedy performance in the last six months.

2.4.5 DEMOGRAPHICS

Some noteworthy demographic variations emerge in the composition of theatre-comedy audiences (see Table 4). While theatre-comedy audiences are disproportionately women, this over representation disappears among the most frequent attenders.

Although theatre-comedy attenders among the general public are slightly more likely to be women, this difference is not as great. Among the general public, a somewhat larger proportion of those who attend more frequently report annual household income levels in excess of $60,000. In addition, a higher proportion of those under 45 years are more frequent attenders of theatre-comedy.

In terms of life cycle, among theatre-comedy audiences, young singles, as seen in Table 4, for both audience and general public, represent a significant proportion of the audience. Despite having family obligations, and distinct from other types, young parents are a significant part of the theatre-comedy audience, at least among the general public. The audience figures show much less frequent attendance for this group. The discrepancy between the two sets of data suggests the possibility that young parents among the general public are indicating their wish to attend theatre-comedy, rather than their actual behaviour.

Table 4
THEATRE-COMEDY: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	THEATRE-COMEDY AUDIENCE	DID NOT ATTEND	ATTENDED 1/2 TIMES	ATTENDED 3/4 TIMES	GENERAL PUBLIC TOTAL	NEVER ATTENDED	ATTENDED IN LAST 5 YEARS	ATTENDED IN LAST 6 MONTHS
	%	%	%	%	%	%	%	%
GENDER								
Male	40	35	38	49	46	51	46	48
Female	60	64	62	51	52	49	54	52
AGE								
16 - 24 years	12	10	14	10	16	14	16	19
25 - 34 years	22	17	26	20	26	27	27	25
35 - 44 years	24	29	21	26	24	23	26	24
45 - 54 years	18	15	19	19	14	13	14	14
55 - 64 years	17	19	17	16	10	11	9	10
65 years or older	7	10	4	9	10	12	7	8
HOUSEHOLD INCOME								
Less than $10,000	5	4	3	10	7	8	5	6
$10,000 - $19,999	10	10	11	8	14	17	11	9
$20,000 - $29,999	4	2	4	7	18	20	15	16
$30,000 - $39,999	13	9	16	11	17	17	18	16
$40,000 - $49,999	12	10	14	12	18	17	16	19
$50,000 - $59,999	12	12	12	14	11	10	14	11
$60,000 - $74,999	10	20	15	21	8	7	8	10
$75,000 or more	24	33	25	17	8	5	13	13
EDUCATION: Highest level								
Less th. high sch.	3	3	3	2	18	25	11	10
High school diplo.	26	28	25	26	27	30	23	22
College	23	16	25	26	17	17	18	17
Some university	-	-	-	-	8	6	8	9
Bachelor's degree	28	35	25	29	13	9	17	17
Grad/Prof. degree	16	18	21	18	6	3	7	7
Student	-	-	-	-	12	9	13	16
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	26	21	27	27	24	21	25	30
Married, under 45, no child. at home	13	19	10	14	10	10	12	10
Married, under 45, childr. present	17	15	20	13	29	31	30	25
Single parent	6	5	7	5	4	4	4	5
Married, 45 and +, childr. present	12	11	11	12	9	10	8	9
Married, 45 and +, no child. at home	19	23	17	20	15	16	14	14
Single, 45 and +, no child. at home	8	7	7	10	8	9	6	8

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.5 Avant-Garde Theatre

2.5.1 ATTENDANCE PATTERNS

Attendance at a performance of avant-garde theatre among Canadians is among the lowest reported of all Traditional or Popular performing arts. One-in-ten report having attended a performance either in the last six months (5%) or in the last five years (5%). Most Canadians (90%) say they have "never" attended.

Similarly, among avant-garde theatre audiences surveyed, frequency of attendance is among the lowest of any of the Traditional performing arts surveyed. Although nearly half (49%) report having attended a performance of theatre-avant-garde once or twice in the last season, less than one-in-five (18%) say they attended three or more times. This may well reflect the limited availability of this product, particularly outside of the major centres.

Interest among the general public in attending avant-garde theatre is limited. In fact only one-in-ten (10%) indicate an interest, which is among the lowest of the Traditional performing arts. Interest is higher among audiences (31%) surveyed compared with the general public, though lower than reported interest among audiences for other types of Traditional performing arts. Those who attended a performance of avant-garde theatre once or twice in the last season are slightly more likely to express an interest in attending more frequently, compared with those who attended three or four times in the last season, though this difference is not that great (16% compared to 7%). Interestingly, those who were surveyed at an avant-garde theatre performance, but did not attend in the last season, are as likely as those who attended three or four times, to express an interest in attending more frequently.

As noted in the overview, interest in attending avant-garde theatre is low across all audience types. However, there is some tendency for audiences of other avant-garde performance types to express an interest in attending more frequently.

For example, contemporary dance and contemporary classical music audiences are more likely to express interest in attending experimental theatre more frequently than audiences surveyed at other types of performances. Even among the general public, avant-garde theatre attenders are among the most likely to report an interest in attending contemporary dance performances.

2.5.2 EXPECTATIONS AND PERCEPTIONS

Expectations of avant-garde theatre audiences are noticeably different than those of other traditional audiences, and audiences overall. Table 1 indicates the extent to which avant-garde theatre audiences agree or disagree with a series of statements relating to theatre, in comparison to Traditional audiences overall, and audiences in general.

Plays that are classics and have been around for years are not as appealing to avant-garde theatre audiences compared with others. In fact, less than one-in-five (18%) agree that they prefer these types of performances -- nearly three-in-ten (28%) disagree.

Table 1

AVANT-GARDE THEATRE: STATEMENTS ABOUT THEATRE

	Agree strongly	Agree somewhat	Agree/ Disagree slightly	Somewhat Disagree	Strongly Disagree	No opinion
Like to see plays that are classic	%	%	%	%	%	%
Total audience	12	24	44	12	6	
Traditional audience	12	24	44	12	5	
Theatre avant-garde audience	7	11	53	19	9	2
Prefer to see plays that deal with social issues/problems						
Total audience	10	25	44	10	6	4
Traditional audience	11	25	44	10	6	4
Theatre avant-garde audience	20	38	34	4	2	2
Identify with plays written by Canadian playwright						
Total audience	9	19	45	14	9	
Traditional audience	9	19	45	14	9	
Theatre avant-garde audience	17	28	41	8	4	2
Prefer to attend plays that star well-known performers						
Total audience	10	20	44	13	9	
Traditional audience	10	21	44	13	9	
Theatre avant-garde audience	4	18	50	14	13	2
Find it difficult to sit for 2 or 3 hours ar a show or performance						
Total audience	4	6	20	19	48	
Traditional audience	4	6	18	18	50	
Theatre avant-garde audience	4	5	20	19	50	2

Further, avant-garde theatre audiences are less likely to prefer plays that star well known performers. While just over three-in-ten (31%) of traditional audiences at least somewhat agree that this is their preference, approximately one-in-five (22%) from avant-garde audiences indicate this preference -- fewer of those who attend most frequently agree. Further, over one quarter (27%) disagree, which is a somewhat larger proportion than found among Traditional performing arts audiences overall (22%).

While interest in the classics and the star-studded shows may be lower among avant-garde audiences, interest in plays that deal with contemporary social issues and problems, and those written by Canadian playwrights, is clearly higher. In all, well over half (58%) of avant-garde theatre audiences agree, at least somewhat, that they "prefer to see plays that deal with contemporary social issues and problems." Among the most frequent attenders, as many as 70% are in agreement. In comparison, much lower proportions of Traditional audiences (36%) or audiences overall (35%) agree that they prefer

plays that deal with contemporary social issues and problems. Somewhat lower than audiences overall, approximately one third (34%) of avant-garde theatre audiences indicate no clear opinion -- very few (6%) say they disagree with this statement.

Interest in plays by Canadian playwrights is much higher among avant-garde theatre audiences, than others. In fact, nearly half (45%) agree, at least somewhat, that they "identify with plays written by Canadian playwrights," compared with much lower proportions of traditional audiences in general (28%), or audiences overall (28%) who agree. Among most frequent attenders, as many as 61% of avant-garde theatre audiences say they agree.

Similar to other audiences, less than one-in-ten (9%) avant-garde theatre audiences agree that they "find it difficult to sit for two or three hours at a show or performance." While 69% of avant-garde theatre audiences say they disagree with this statement, among the most frequent attenders this proportion increases to 75%.

Avant-garde theatre audiences' expectations of performances are quite diverse. However, "having a strong emotional impact" (65%) is singled out as the single most frequently cited expectation. Second highest mention is "providing insight into who you are" (53%). Further attesting to the importance avant-garde theatre audiences place on performances that deal with social issues and problems, just under half (45%) indicate that "the performance be about social issues" is one of their top three expectations. While a significant proportion indicate that they identify with plays written by Canadian playwrights, relatively fewer (23%) cite "being performed by Canadians artists" as one of their top three expectations. In sum, these results suggest that unlike other Traditional performing arts audiences, and even other theatre audiences, avant-garde theatre audiences reject the classics and want to see plays dealing with social issues. And for many, theatre that provokes personal self-analysis also appears to be an important dimension.

Among the general public, expectations of theatre-avant-garde attenders are quite diverse. The three expectations most likely to be mentioned are "being about real people facing real life situations" (45%), "being entertaining" (39%) and "allowing you to forget your problems" (38%).

2.5.3 Ticket Purchasing and Subscription Issues

The proportion of avant-garde theatre audiences holding subscription tickets is among the lowest of the Traditional performing arts audiences. While under one quarter (23%) report having subscriptions specifically to avant-garde theatre productions, only 25% report having any subscriptions at all. Further, half (49%) say they have never held subscription tickets, which is notably lower than Traditional audiences generally. Simply stated, avant-garde theatre audiences are the least likely of Traditional performing arts audiences to have subscription tickets to any type of performance surveyed. Although few report holding subscription tickets, well over half (58%) recall having been contacted regarding subscribing. This, however, is also a relatively low proportion suggesting that this audience is not reached by the promotional efforts of the major mainstream Traditional performing arts companies in a community.

Table 2
AVANT-GARDE THEATRE AUDIENCE: TICKET AND SUBSCRIPTION PRICE ISSUES

	THEATRE-AVANT-GARDE AUDIENCE %	TOTAL TRADITIONAL AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	12	9	10
$10 - $14	19	19	18
$15 - $19	21	25	21
$20 - $24	23	17	15
$25 - $29	7	9	9
$30 - $34	1	4	5
$35 - $39	0	2	3
$40 - $49	1	3	3
$50 - $74	1	2	4
$75 or more	*	1	2
Gift	9	4	4
No opinion	7	6	6
Mean amount	$18	$21	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	23	27	28
$4.00 higher	23	22	21
$6.00 higher	12	10	10
$10.00 higher	16	14	14
NOT ATTEND IF ANY HIGHER:	15	16	17
No opinion	11	11	10
AMOUNT PAID FOR YEAR'S SUBSCRIPTION: *			
Less than $50	11	13	15
$50 - $99	63	26	22
$100 - $199	19	30	30
$200 - $299	1	15	14
$300 - $399	4	7	6
$400 or more	*	7	6
No opinion	16	18	19
Mean amount	$82.65	$159.06	$151.08
NUMBER OF PERFORMANCES IN SUBSCRIPTION:*			
3 performances	1	7	8
4 performances	24	16	17
5 performances	41	23	25
6 or more performances	33	52	50
No opinion	25	27	28
CONTINUE WITH SUBSCRIPTION IF PRICES INCREASED BY: (LARGEST INCREASE PREPARED TO BUY) *			
5%	47	42	43
10%	21	26	26
15%	21	22	23
Would discontinue	12	9	9
No opinion	15	15	16

* Less than 0.5 %.

2.5.4 PRICING ISSUES

Relative to other types of performance, avant-garde theatre audiences pay somewhat less for their tickets, on average. While audiences overall paid, on average, $23 for a single ticket to a performance, theatre-avant-garde audiences paid four dollars less at approximately $19, for a single ticket. In fact, nearly three quarters (74%) of avant-garde theatre audiences report paying under $25 — only one-in-ten (10%) paid $35 or more.

With respect to price flexibility, just under three-in-ten say they would attend a performance if the price of the ticket were up to $6 higher (28%), which is a slightly higher proportion than found among traditional audiences (24%) or audiences overall (24%). A slight majority (51%) indicate that they would pay an additional $4, at most. However, a large majority (74%) would be prepared to pay $2 more for a single ticket. Similar to the proportion of traditional audiences, and audiences overall, 15% of avant-garde theatre audiences indicate that they would not attend if the price of a single ticket was any higher.

As noted above, less than one quarter (23%) of those surveyed at an avant-garde theatre performance had subscription tickets to the performance. In terms of the price of the subscription tickets, nearly three quarters (74%) of theatre-avant-garde audiences paid less than $100, with over six-in-ten (63%) indicating that they paid between $50 and $100. With respect to the number of performances included in the subscription series, three quarters report that the subscription series includes five or more performances, with one third indicating at least six performances. In terms of the price flexibility with respect to the cost of subscription tickets, almost all (88%) indicate that they would continue with the subscription if prices increased by only 5%. Four-in-ten (42%) indicate that they would still continue with the subscription series if prices increased by 10%. Similar to other audiences, just over one-in-ten (12%) say they would discontinue their subscription.

There appears to be more price flexibility among avant-garde theatre audiences, compared with the general public. While there is little difference between the average amount avant-garde theatre audiences paid and the average amount they would be willing to pay ($19 compared to $20), Table 3 shows that some differences do emerge in the data. The slim majority (54%) of avant-garde theatre audiences report paying over $15 for a single ticket, while over six-in-ten (63%) say they would be prepared to pay over this amount. However, in comparison among the general public, less than half (45%) of avant-garde theatre attenders say they would be prepared to pay $15 or more.

2.5.5 DEMOGRAPHICS

The demographic characteristics of theatre-avant-garde audiences suggest some unique characteristics (see Table 4). Avant-garde theatre audiences are slightly more likely to be women. However, this difference is not present among those who did not attend in the last complete season. In addition, this gender difference is not present among the general public. Avant-garde theatre audiences tend to be younger, with well over half (59%) being under 35 years. However, when we look at those who attended most frequently in

the last complete season, they tend to be somewhat older or between 35 and 44 years of age.

Interestingly, among the general public, those who attended in the last six months are more likely to be under 35 years.

Among both avant-garde theatre audiences and the general public, attenders are notably more likely to have bachelor degrees, and among the general public, they are likely to be students.

In terms of life cycle, avant-garde theatre audiences are most likely to be composed of young singles,with no children. In fact, among those who attended most frequently in the last season, over half are single, under 45 years of age and have no children. Consistent with the audience data, those among the general public who report attending an avant-garde theatre performance in the last six months are notably more likely to be younger, single, and with no children. Those over 45 years of age, regardless of their marital status, are much less likely to be represented in the avant-garde theatre audiences, or among the general public attenders of this type of performance.

Table 3

AVANT-GARDE THEATRE AUDIENCE: AMOUNT PAID FOR PERFORMANCE ATTENDED AND AMOUNT PREPARED TO PAY FOR A THEATRE PERFORMANCE

	GIFT	$10- OR LESS	$11- $15	$16- $19	$20- $24	$25- $29	$30- $39	$40- $49	$50-OR MORE	MEAN AM'T	NOTHING/ NOT INTERESTED	NO OPINION
	%	%	%	%	%	%	%	%	%	$	%	%
AVANT-GARDE THEATRE AUDIENCE												
Amount paid *	9	12	19	21	23	7	1	1	1	$19	-	7
Amount prepared to pay	-	8	27	26	21	7	4	2	3	$20	-	2
GENERAL PUBLIC/Avant-garde theatre attender**												
Amount prepared to pay	-	21	21	12	15	8	5	2	3	19	9	4

* The categories for the amount paid question are slightly different: Less than $10, $10 - $14, $15 - $19. Thereafter the categories are the same.

** Reported that they attended an avant-garde theatre performance in the last six months.

Table 4
AVANT-GARDE THEATRE: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	AVANT-GARDE AUDIENCE %	DID NOT ATTEND %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %	GENERAL PUBLIC TOTAL %	NEVER ATTENDED %	ATTENDED IN LAST 5 YEARS %	ATTENDED IN LAST 6 MONTHS %
GENDER								
Male	46	49	44	45	46	49	46	47
Female	54	51	56	54	52	51	54	53
AGE								
16 - 24 years	28	33	28	18	16	14	20	33
25 - 34 years	31	24	35	32	26	27	26	22
35 - 44 years	20	20	18	25	24	24	21	22
45 - 54 years	12	10	13	14	14	14	13	10
55 - 64 years	6	8	3	9	10	11	11	6
65 years or older	3	4	2	2	10	10	8	8
HOUSEHOLD INCOME								
Less than $10,000	14	13	17	8	7	7	3	7
$10,000 - $19,999	13	12	13	15	14	14	9	11
$20,000 - $29,999	3	7	2	0	18	18	16	17
$30,000 - $39,999	13	9	13	22	17	17	14	14
$40,000 - $49,999	8	6	9	10	11	11	10	10
$50,000 - $59,999	10	9	13	5	8	8	10	9
$60,000 - $74,999	10	9	13	5	8	8	10	9
$75,000 or more	25	24	12	18	8	7	17	16
EDUCATION: Highest level								
Less th. high sch.	0	0	1	0	18	19	9	7
High school dipl.	20	27	16	16	27	28	14	16
College	29	33	29	20	17	18	14	11
Some university	-	-	-	-	8	7	11	8
Bachelor's degree	35	27	34	50	13	12	20	18
Grad/Prof. degree	16	13	19	14	6	4	12	11
Student	-	-	-	-	12	10	18	26
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	47	41	48	55	24	22	33	42
Married, under 45, no child. at home	17	18	19	12	10	10	12	11
Married, under 45, child. present	12	10	12	12	29	30	20	20
Single parent	5	9	3	2	4	4	4	4
Married, 45 and +, child. present	4	5	4	2	9	9	8	7
Married, 45 and +, no child. at home	7	8	7	7	15	15	13	11
Single, 45 and +, no child. at home	8	8	7	10	8	9	9	5

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.6 Opera

2.6.1 Attendance Patterns

Generally, Canadians are not opera-goers, with nine-in-ten (90%) of the general public reporting that they have never attended an opera performance. Only 5% of the population reports attendance in the past six months, with the remaining 5% reporting attendance over the past five years; this, however, may be directly related to the non-availability of opera outside of the major centres. In the three major centres, 9% of the public report having attended in the last six months.

Among the opera audience, more than one quarter (26%) report that they did not attend a performance in the last season, although a majority (74%) report attending at least one or two performances and more than one third (36%) report attending with greater frequency.

Relative to other performance types, opera audiences report among the highest proportion of non-attendance in the last complete season, but when they do attend in a season, they tend to be more frequent-than-average attenders. It would appear that the higher-than-average frequency is driven, in part, by the significant proportion of audience members who purchase tickets through subscription. In fact, subscription data indicate that almost half (47%) of opera audience members purchase their tickets on a subscription basis.

It should be also be noted that the frequencey of attendance at opera is likely to be related to the comparatively fewer opera performances during a season. Simply put, performances of symphonic music are offered more frequently than opera.

There is little interest among the general public in attending opera performances, perhaps due to a lack of availability and therefore a lack of familiarity, although significant interest exists among the opera audience itself for more frequent attendance. In fact, the data indicate that one-in- two opera attenders report that they would like to attend more performances. Interestingly, the desire to attend more performances is highest among current frequent attenders (i.e., those who attended at least 3 or 4 performances during the last season) and declines as reported attendance during the last season declines. It should be noted, however, that even among those who did not attend a performance last season, just under half report that they would like to attend more.

These data suggest that the opera audience will most readily be broadened among the current opera audience itself. Not only are those who attended in the last season relatively frequent attenders, they express a relatively high desire to attend more frequently in the future.

In seeking to broaden the audience base, the obvious place to look is among audiences of other performing arts types beyond the current opera audience. Just as opera audiences report attendance at a wide range of primarily Traditional performance types, other audiences also attend opera performances. In fact, the findings indicate that other audience types are also interested in attending opera. The most notable audience types expressing interest in attending more opera performances include audiences of symphonic music

(32%), chamber/soloists (28%) ballet (27%) contemporary classical (26%) and symphonic "pops" (21%).

Among those within the general population who have attended a performance of some type within the last six months, similar responses are reported. Those who have attended a chamber/soloist performance (34%), a symphonic music performance (32%), a performance of choral music (28%) or the ballet (28%) are most inclined to report that they would like to attend more opera performances.

Clearly, both the audience findings and the general population findings indicate that only a minority within each group is inclined to identify opera as a performing art in which they have a significant interest. The appeal of opera is limited even among those who report an interest in or have attended other Traditional arts performances.

With the exception of those who have attended musicals (21% report an interest in seeing more opera), less than one-fifth of the general population reporting attendance at any of the Popular performance types, express an interest in attending more opera.

As reported above, the fact that 90% of the general population reports never having attended an opera performance represents a significant barrier to expanding the audience for such performances. Interest is limited to those who have attended similar Traditional types of performances (e.g. symphonic and choral music and ballet), although even among these subgroups the interest in opera is not particularly strong.

2.6.2 Expectations and Perceptions

In order to better understand some of the constraints and opportunities available in marketing opera, a series of agree/disagree statements regarding opera were included in the audience survey (Table 1). Both the total (78%) and Traditional audiences (83%) report majority agreement with the view that "some of the arias and music from opera are very beautiful," Clearly, there is little question regarding the beauty of some opera music. The opera audience itself is significantly more inclined to agree with the view (95%) and is notably more intense in its agreement (84% report "strong agreement").

Comprehension of the performance does appear, however, to have some mild influence on audience attendance. A significant minority of both the total (28%) and Traditional (25%) audiences agree that they would attend opera more if they understood what was being sung. Only a small minority of opera-goers (16%) agree with this view and a majority (56%) report disagreement, with "strong disagreement" (40%) notably intense. In contrast, less than four-in-ten respondents among both the total audience and the traditional audience report disagreement with this view (35% and 38% respectively).

These findings are further corroborated by responses to questions related to surtitles at opera performances. Three quarters (77%) of the opera audience report that they have attended an opera with surtitles, while among recent attenders in the general audience only 30% have attended a performance of opera with surtitles. In line with these findings, only 26% of the general audience for the performing arts report that surtitles would increase the likelihood of attendance at an opera performance, whereas 40% of the opera audience report that surtitles would increase their likelihood of attendance.

Table 1

OPERA AUDIENCE: STATEMENTS ABOUT OPERA

	Agree strongly %	Agree somewhat %	Agree/ Disagree slightly %	Somewhat Disagree %	Strongly Disagree %	No opinion %
Some of the arias and music from operas are very beautiful						
Total audience	60	18	12	2	2	5
Traditional audience	65	18	10	1	2	4
Opera audience	84	11	4	0	0	1
Would go more if understood what was being sung						
Total audience	11	17	33	13	22	6
Traditional audience	9	16	31	14	24	5
Opera audience	8	8	25	16	40	3
Stories more realistic/enjoy them more						
Total audience	6	12	34	17	24	6
Traditional audience	5	11	33	18	27	6
Opera audience	4	8	21	20	44	3
Get caught up in elaborate sets and costumes						
Total audience	17	24	35	9	9	6
Traditional audience	14	23	36	11	10	6
Opera audience	27	23	31	8	8	3

Clearly, the use of surtitles is more appealing to the current audience rather than to a potential opera audience. It is worth noting, however, that even among the general audience, one quarter report that the use of surtitles in opera performances would increase attendance. Despite the fact that opera attenders are most inclined to report that surtitles would increase attendance, attendance at opera among the general performing arts audience would be enhanced with increased use of surtitles. These data reveal that the use of surtitles does have a mild influence on likelihood of attendance at opera performances among the general audience and a stronger influence among the opera audience itself. Clearly, surtitles are an important component of the enjoyment of opera for opera-goers and could be an incentive for attendance among the general audience.

Similarly, realism in the story-lines or librettos of opera appears to have some impact on opera enjoyment, especially among the general performing arts audience. A substantial majority (77%) of opera-goers disagree with the view that they would enjoy opera more if the stories were more realistic. Those who are not part of the opera audience,

however, are somewhat less inclined to disagree (59% report disagreement with the view) that realism would enhance enjoyment of opera performances. These findings suggest that the perceived unreality of opera story lines (or lack of awareness of the story-lines) impedes enjoyment of opera performances among the general performing arts audience. Fully one third (34%) of the general audience agrees that they would enjoy opera more if they had stories that were more realistic. In contrast, less than one-in-five opera attenders (18%) report that they would enjoy opera more were it to have more realistic stories.

Finally, while a majority (60%) of the general audience reports agreement with the view, "you get caught up in the elaborate sets and costumes of opera," opera-goers themselves are more inclined to agree (70%) and more inclined to "strongly agree" (27% versus. 14%). It is worth noting, however, that both audiences (i.e. the general audience and the opera audience) agree that the elaborate sets and costumes are an attraction to opera and something that they get "caught up in." Clearly, set design and costuming are important factors in influencing opera attendance and potential opera attendance among the general performing arts audience.

These findings, taken together, suggest that more widespread use of surtitles will have a positive effect on both the likelihood of increasing attendance among the general audience and frequency of attendance among the current opera audience. It would appear that such a practice will make opera more accessible to a wider audience and more enjoyable for the current audience.

Reality in opera does not appear to have a significant influence on enjoyment. The data suggest that both the general and the opera audience recognize and accept the inherent 'unreality' of opera and do not believe that greater reality would enhance enjoyment. Part of the experience of opera appears to be driven by its 'larger-than-life' nature and unreality. It is worth noting, however, that a significant minority of the general audience concede that more realistic operas would enhance enjoyment. These findings suggest that a broader audience may be attracted to opera performances if more contemporary operas with more contemporary story lines were offered as part of the opera season.

Clearly, the data suggest the elaborate (and, by extension, the unreal) sets and costuming inherent in most opera is attractive to both the general audience and the opera audience. It is deemed to be a vital component of opera, a component that allows audiences to "get caught up in" performances, thereby enhancing the experience and enjoyment of opera. Finally, all audiences agree regarding the beauty of some of the arias and music, and this clearly represents a further marketing tool.

While opera audiences have somewhat different expectations than the general audience regarding the specifics of a performance, when broad, general expectations are considered, they are in fact quite similar to other audiences. They both concede that some of the music of opera is beautiful; significant minorities concede that surtitles would enhance attendance; realism is not particulary important to either; the elaborate sets and costuming are key to the enjoyment and experience of opera.

2.6.3 TICKET PURCHASING AND SUBSCRIPTION ISSUES

Opera audiences do not differ significantly from other audiences in their ticket purchasing habits. While in-person purchase is preferred, opera audiences are somewhat less inclined than average to make in-person purchases at a box office. They tend to be somewhat more inclined to purchase by telephone at a box office. Like most other audiences, they are significantly more likely to purchase through a box office than through a ticket agency. In fact, whether by telephone or in person, they are almost three times as likely to purchase through a box office (64%) than through a ticket agency (22%).

Relative to most of the other mainstream Traditional performing arts types, opera audiences are more inclined to be subscribers. Almost half of the opera attenders (47%) reported that they had subscribed to the performance they were attending.

2.6.4 PRICING ISSUES

Relative to other types of performances, including Traditional performance types, opera audiences pay, on average, significantly more for their tickets. In fact, the average price for opera tickets is among the highest price paid for all performances, with the exception of Country and western music performances and musicals.

As Table 2 notes, the mean amount for opera performances is $28 compared to $21 and $23 respectively, for Traditional performances and all audiences surveyed. The higher mean for opera performances is a result of two factors: fewer opera audiences paid less than $15 (10%) compared with audiences of other Traditional performing arts (28%) and audiences generally (28%); and, more opera audiences paid $30 or more (25%) relative to Traditional audiences (12%) and audiences generally (17%).

Even though opera-goers are paying among the highest average ticket prices, they do not differ significantly from all other audiences or from the Traditional audience in their willingness to pay more for their tickets.

Table 2 shows that 30% of opera audiences are prepared to pay at least $6 more for a ticket, while half (50%) are prepared to pay at least $4 more and 74% are prepared to pay at least $2 more. This suggests that there is some price flexibility, certainly in terms of $2 to $4 increases.

As noted in the previous section, almost half (47%) of those surveyed at an opera performance had subscription tickets to the performance. Despite one-in-two attenders holding subscriptions, prices varied considerably in terms of the amount paid. While more than one quarter (29%) report that they paid less than $100 for their subscription series, prices are significantly higher than most other performances and relatively high in comparison to what other Traditional performing arts audiences paid. Almost four-in-ten (39%) of traditional audiences paid less than $100 for their subscription series.

In addition to paying more for their subscription series, opera audiences appear to be getting fewer performances for their money. In all, 61% of opera audiences report getting four or fewer performances in their series compared to 23% of the total Traditional performing arts audience. Only 24% report six or more performances compared to 52% among Traditional performing arts audiences overall. Put another way, opera audiences

who subscribe, pay on average, $40 for a performance (mean subscription at $198/mean number of performances of 4.9 performances per subscription), while Traditional performing arts audiences overall pay $30 per performance (mean subscription of $158/mean number of performances of 5.3 per subscription).

Table 2
OPERA AUDIENCE:
TICKET AND SUBSCRIPTION PRICE ISSUES

	OPERA AUDIENCE %	TRADITIONAL AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	1	9	10
$10 - $14	9	19	18
$15 - $19	37	25	21
$20 - $24	6	17	15
$25 - $29	12	9	9
$30 - $34	5	4	5
$35 - $39	4	2	3
$40 - $49	10	3	3
$50 - $74	5	2	4
$75 or more	1	1	2
Gift	3	4	4
No opinion	6	6	6
Mean amount	$28	$21	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	24	27	28
$4.00 higher	20	22	21
$6.00 higher	11	10	10
$10.00 higher	19	14	14
NOT ATTEND IF ANY HIGHER:	16	16	17
No opinion	16	11	10
AMOUNT PAID FOR YEAR'S SUBSCRIPTION *:			
Less than $50	10	13	15
$50 - $99	19	26	28
$100 - $199	27	31	30
$200 - $299	21	15	14
$300 - $399	12	7	6
$400 or more	11	7	6
No opinion	16	18	19
Mean amount	$197.70	$159.06	$151.08
NUMBER OF PERFORMANCES IN SUBSCRIPTION:			
3 performances	23	7	8
4 performances	38	16	17
5 performances	15	23	25
6 or more performances	24	52	50
No opinion	26	27	28
CONTINUE WITH SUBSCRIPTION IF PRICES INCREASED BY:			
5%	42	42	43
10%	22	26	26
15%	24	22	23
Would discontinue	12	9	10
No opinion	13	15	16

* Those questions with *no opinion* above 10% have been recalculated to exclude the *no opinions*.

Despite higher costs for subscriptions, opera audiences do not differ significantly from Traditional performing arts audiences in their willingness to pay price increases for their subscriptions. Overall, opera subscribers display little resistance to an increase in subscription prices, with only 12% (compared to 9% in the Traditional audience) reporting that they would discontinue their subscription should the price increase. Like the Traditional audience, opera audiences are also divided in how much of an increase they are prepared to tolerate. The majority (88%) of opera audiences report tolerance for a 5% increase in subscriptions, while 46% of opera audiences would tolerate a 10% increase and one quarter (24%) would tolerate a 15% increase.

These findings suggest that there is enough flexibility to increase subscription prices by 5%. An increase of 10% or more would likely result in significant declines in the number of subscriptions purchased.

2.6.5 DEMOGRAPHICS

The demographic characteristics of opera audiences suggest some very unique characteristics. Women are more avid opera attenders than men. As Table 3 reveals, 62% of those surveyed at opera performances were women. Frequency of attendance, however, does not have a significant impact on gender proportion within audiences.

This apparent gender disproportion among the opera audience is not confirmed through an examination of the general public. The general population is more evenly divided across gender lines with roughly half being women and half men, although some exceptions are evident. Women are no more inclined than men to report attendance in the last six months; however, they are somewhat more inclined to report attendance in the past five years.

In terms of age, opera audiences are older than the population overall. Among the opera audience, half (50%) are 55 years of age or older. Almost two thirds (64%) of the audience who report that they did not attend in the last season are 55 years of age or older, while more than half (53%) of the most frequent attenders are over 55 years of age.

Income and education data suggest that opera audiences tend to be affluent and better educated, with almost half (49%) the audience earning $50,000 per year or more and more than half (54%) holding at least an undergraduate university degree.

The proportion of high-income earners (i.e. those earning over $50,000 per annum) increases in direct relation to the frequency of attendance. In other words, a higher proportion of frequent attenders are higher income earners. The same relationship does not hold across education lines, although more frequent attenders tend to consist of a higher proportion of those with at least a bachelor's degree than those who did not attend in the last season.

An examination of life cycle stages confirms the age skew apparent among opera audiences noted above. Half (50%) the total opera audience consists of respondents over 45 years of age. Just over half (54%) of this subgroup consists of older married respondents with no children in the home and just under half (46%) consists of older singles, typically the widowed, without children.

In contrast, among the general public, young singles without children are most inclined to have attended opera in both the last five years (30%) or in the last six months (29%). It is worth noting, that an older segment of the population without children are also among those within the general population who are more likely to have attended an opera performance in the last six months. These findings clearly indicate that among the most recent attenders within the general public, more than six-in-ten are either young, childless, singles or older, childless couples and singles.

To summarize, those most likely to be attending opera performances are either at the beginning of the adult life cycle or in the last two stages. Moreover, older couples without children in the home and childless singles are most likely to be regular members of the audience with more than half (53%) of those reporting attending at least three performances last season coming from these two final life cycle stages. The replacement of this audience by younger opera-goers is clearly a significant challenge for opera companies.

Table 3

OPERA: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	OPERA AUDIENCE TOTAL %	DID NOT ATTEND %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %	GENERAL PUBLIC TOTAL %	NEVER ATTENDED %	ATTENDED IN LAST 5 YEARS %	ATTENDED IN LAST 6 MONTHS %
GENDER								
Male	36	40	33	37	49	49	41	49
Female	62	59	65	61	51	51	59	51
AGE								
16 - 24 years	5	0	7	6	16	16	16	16
25 - 34 years	12	7	22	5	26	27	22	20
35 - 44 years	15	15	17	13	24	24	28	18
45 - 54 years	19	15	18	24	14	14	13	16
55 - 64 years	20	25	16	21	10	10	10	14
65 years or older	30	39	21	32	10	9	11	16
HOUSEHOLD INCOME								
Less than $10,000	4	5	7	0	7	7	6	3
$10,000 - $19,999	9	8	9	8	14	14	11	8
$20,000 - $29,999	5	2	7	5	18	18	16	13
$30,000 - $39,999	13	5	19	13	17	17	15	12
$40,000 - $49,999	21	46	13	13	18	17	15	22
$50,000 - $59,999	11	12	11	9	11	11	10	18
$60,000 - $74,999	12	3	10	21	8	8	9	10
$75,000 or more	26	19	25	31	8	7	17	15
EDUCATION: Highest level								
Less th. high sch.	4	8	2	3	20	19	9	6
High school diplo.	21	27	15	23	27	28	16	16
College	21	19	24	19	17	17	14	17
Some university	-	-	-	-	7	7	10	10
Bachelor's degree	26	21	31	24	12	12	21	22
Grad/Prof. degree	28	24	28	30	6	5	14	14
Student	-	-	-	-	11	11	16	14
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	15	11	21	11	24	23	30	29
Married, under 45, no child. at home	8	4	13	5	10	11	11	4
Married, under 45, child. present	7	7	10	5	29	30	23	19
Single parent	5	6	4	6	4	4	4	5
Married, 45 and +, child. present	15	11	12	20	9	9	8	10
Married, 45 and +, no child. at home	27	31	20	31	15	15	13	24
Single, 45 and +, no child. at home	23	30	20	22	8	8	11	10

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.7 Symphonic Music

2.7.1 ATTENDANCE PATTERNS

Symphonic music performances appear to be one of the more attended types of traditional performances, aside from theatre. In all, 22% of Canadians report having attended a symphonic performance at some point in their lives. Moreover, the proportion of the population reporting that they have attended a symphonic performance in the last six months is also quite large, relative to other Traditional types of performances, with 12% of the population reporting attendance.

This core audience also appears to be frequent attenders throughout the season. The audience survey data indicate that 64% of the symphonic audience report attending at least three performances during the last complete season. This is, by far, the highest proportion of frequent attenders among the Traditional performance types. (As will be noted later, this is primarily a result of the high proportion of subscription ticket holders in the audience). Overall, there is some interest among both audiences and the general public in attending symphonic music performances.

However, the greatest expressions of interest come from those who already constitute the symphonic music audience or attend other types of "classical" music performances. Thus, among symphonic music audiences, 46% report that they would like to attend more symphonic performances, while 56% say this among the general public who report attending a symphonic performance in the last six months. Among other "classical" music and opera and choral audiences, a third or more express interest in attending symphonic performances more frequently. The same general pattern is also apparent among the general public who report attending these specific types of performances in the last six months. In addition, there is some tendency for ballet audiences and jazz/blues audiences to express some interest in attending more symphonic performances.

Like other Traditional performing arts audiences, those attending symphonic music performances appear to attend a variety of other performance types. Similarly, the audiences of other Traditional performance types also attend symphonic performances. In particular, ballet audiences, and audiences from other "classical" music types as well as opera and choral music report attending symphonic performances. In fact, over two thirds or more of these other "classical" music audiences report having attended a performance of symphonic music during the last complete season.

The size of the potential audience for symphonic music performances is neither large nor small. In all, 32% of the general public say they have either attended a symphonic music performance or would like to attend a performance.

When asked to indicate how much they enjoy "classical" music, 25% of the general public say they enjoy it a great deal. This suggests that the potential market for symphonic music is between a quarter and a third of the population. In large part this audience is likely to come from those with some exposure to symphonic music.

In particular, among audiences, those who attended at least three concerts last season are the most likely to express the strongest interest in more frequent attendance. Among the general public, those who have attended, but not in the last five years, express the greatest interest in attendance.

Table 1

SYMPHONIC MUSIC AUDIENCE: STATEMENTS ABOUT CLASSICAL MUSIC

	Agree strongly %	Agree somewhat %	Agree/ Disagree slightly %	Somewhat Disagree %	Strongly Disagree %	No opinion %
Like classical music that is soft and peaceful						
Total audience	27	28	28	8	5	3
Traditional audience	27	28	28	9	6	3
Symphonic audience	28	24	28	11	7	2
Like classical music but find going to concerts too formal						
Total audience	5	13	31	16	30	4
Traditional audience	4	11	29	17	35	3
Symphonic audience	1	5	21	21	50	1
When you hear a piece of classical music you don't usually bother to find out who the composer is						
Total audience	8	13	29	19	27	3
Traditional audience	6	11	27	20	32	3
Symphonic audience	3	8	20	23	44	1
Generally you go to a concert to hear a performance of a particular piece of music you like						
Total audience	15	25	35	13	8	4
Traditional audience	15	25	36	13	7	4
Symphonic audience	16	27	34	14	7	2
When you go to a concert it is usually because you want to hear a particular soloist or conductor						
Total audience	11	21	37	16	11	4
Traditional audience	11	21	38	16	10	4
Symphonic audience	13	22	39	15	9	2
You prefer to attend "pops" concerts of classical music						
Total audience	9	12	32	18	25	5
Traditional audience	8	10	30	20	28	4
Symphonic audience	5	9	29	23	31	2
You would go to more concerts if they played more contemporary classical music						
Total audience	5	9	37	22	23	5
Traditional audience	4	8	35	23	26	4
Symphonic audience	4	7	29	26	33	2
You generally prefer listening to classical music featuring a soloist or small group, rather than an orchestra						
Total audience	6	10	36	25	18	4
Traditional audience	6	10	36	25	19	4
Symphonic audience	4	7	33	29	25	2

2.7.2 EXPECTATIONS AND PERCEPTIONS

Given that there is some interest in more frequent attendance at symphonic performances, an obvious issue is that of identifying the kinds of expectations and preferences audiences and the public have about "classical" music performances. Some of these preferences and expectations are taken up in Table 1, which shows responses to a series of agree/disagree statements about "classical" music.

It is clear from Table 1 that audiences have some specific preferences in terms of symphonic performances. First, symphonic audiences and audiences generally are somewhat motivated to attend symphonic performances because of the program or the personalities involved. In all, 43% and 35% of symphonic audiences, respectively, say they attend a performance because they want to hear a particular piece of music or because of a particular soloist or conductor. This level of attention to the content of a program is reflected to some extent by responses to a statement that essentially asks the respondent if they try to find out the composer of a particular piece of classical music. In all, 44% of symphonic audiences indicate that it is very important to them to find out the composer of pieces they hear.

Overall, however, these responses suggest that symphonic music audiences are less content driven and may simply have a broad liking for symphonic music. This broad interest appears to be more oriented to music that is "soft and peaceful." Fully 56% of the symphonic audiences surveyed indicate agreement with this position. At the same time, their interest is not especially focused on the "pops" side of the symphonic repertoire. While 14% agree they prefer to attend "pops" concerts, a further 29% appear undecided on this issue which suggests at least some interest in "pops." This interest is also not especially focused on contemporary classical music. Eleven percent (11%) of symphonic audiences agree that they would attend performances more frequently if more contemporary classical music were performed, although a further 29% appear undecided.

Finally, in terms of the issue statements shown in Table 1, it is clear that symphonic audiences do not find concerts too formal; in all 50% strongly reject this position and 71% reject it overall. Audiences for other types of Traditional performances, however, identify this as something of a barrier. Thirty five percent (35%) of Traditional audiences strongly reject the position and 46% among this same group reject it overall. This suggests that for a significant segment of the Traditional performing arts audience, the perception that symphonic performances are too formal may well represent somewhat of a barrier.

As with most other Traditional audiences, expectations of the performance are quite similar. Symphonic audiences' most important expectations are that the performance allow them to forget their problems and make them feel good. That the performance has a strong emotional impact, although important, is of less significance than the two items cited above. Among the general public who have attended a performance of symphonic music in the last six months, the same expectations prevail. In addition, however, the general public feels that the performance should be entertaining is also of significance. (This item was not asked in the audience survey.)

2.7.3 TICKET PURCHASING AND SUBSCRIPTION ISSUES

Single ticket purchasers of symphonic performances are among the most likely of audiences to traditional types to report purchasing tickets in person from the box office. Half indicated that they used this approach to purchase tickets for the performance at which they were surveyed. Few among symphonic audiences appear to have ordered tickets by phone or to have used ticket agencies. As noted in the overview section, though, there is a moderate interest among audiences, including symphonic audiences, to purchase tickets more frequently by phone.

Symphonic audiences are, next to symphonic "pops" audiences, the most likely of all traditional audiences to report holding subscription tickets to the performance surveyed. Fully 64% report that they are subscription series holders. It is this high level of subscription holding that likely explains the high level of frequent attendance noted earlier in this section.

While there is a substantial number of subscription series holders among the symphonic audience, there is also greater preference than elsewhere for subscription series tickets. And among this symphonic audience, there is the largest proportion of any audience with experience with subscription tickets; 83% report that they are currently or have been subscription holders.

2.7.4 PRICING ISSUES

Symphonic audiences appear to have paid close to the overall average for single tickets to the performance they attended. As Table 2 notes, the mean amount paid is $20, compared to $21 and $23 respectively, for Traditional audiences and all audiences surveyed. A glance at Table 2 also reveals that while the means for symphonic and traditional audiences are quite close, more symphonic audiences (34%) paid below $15 than did Traditional audiences generally (28%). Although a proportion of their audience pay lower prices generally than for other Traditional types of performances, there is little difference between audiences on the additional amount they are prepared to pay for a ticket. As Table 2 shows, most in the symphonic audience are prepared to pay more, only 15% say they are not. Overall, close to half (48%) indicate that they are prepared to pay at least $4 more, while three quarters (76%) are prepared to pay at least $2 more.

The $2 or so more that symphonic audiences report that they are prepared to pay is confirmed in Table 3, when comparisons between what respondents paid for a single ticket and what they are prepared to pay are examined. As Table 3 notes, while audiences reported paying, on average, $20 for a ticket, they are prepared to pay $22. The most notable areas of change are among those paying relatively low ticket prices; while 14% report paying $10 or less, only 6% say this is the most they are prepared to pay. Similarly, while 4% say they paid $40 or more for a ticket, 8% say they are prepared to pay in this price range.

Among the general public who report attending a symphonic performance in the last six months, the average amount this group is prepared to pay is $21. As with other performance types, interest in a particular type of performance has an impact on what audiences and public are prepared to pay.

Table 2
SYMPHONIC MUSIC AUDIENCE: TICKET AND SUBSCRIPTION PRICE ISSUES

	SYMPHONIC MUSIC AUDIENCE %	TOTAL TRADITIONAL AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	14	9	10
$10 - $14	20	19	18
$15 - $19	18	25	21
$20 - $24	19	17	15
$25 - $29	6	9	9
$30 - $34	7	4	5
$35 - $39	3	2	3
$40 - $49	2	3	3
$50 - $74	1	2	4
$75 or more	0	1	2
Gift	3	4	4
No opinion	6	6	6
Mean amount paid	$20	$21	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	28	27	28
$4.00 higher	22	22	21
$6.00 higher	12	10	10
$10.00 higher	14	14	14
NOT ATTEND IF ANY HIGHER:	15	16	17
No opinion	9	11	10
AMOUNT PAID FOR YEAR'S SUBSCRIPTION:			
Less than $50	4	13	15
$50 - $99	22	26	22
$100 - $199	33	30	30
$200 - $299	18	15	14
$300 - $399	10	7	6
$400 or more	12	7	6
No opinion	18	18	19
Mean amount paid	$198.58	$159.06	$151.08
NUMBER OF PERFORMANCES IN SUBSCRIPTION:			
3 performances	1	7	8
4 performances	16	16	17
5 performances	14	23	25
6 or more performances	69	52	50
No opinion	28	27	28
CONTINUE WITH SUBSCRIPTION IF PRICE INCREASED BY:			
5%	43	42	43
10%	28	26	26
15%	20	22	23
Would discontinue	8	9	9
No opinion	16	15	16

*Those questions with *no opinion* above 10% have been recalculated to exclude the *no opinions*.

Among regular attenders in the audience survey, the mean amount they are prepared to pay is $23. This is well above the $19 reported by occasional members of the audience.

Among the general public, those who have attended a symphonic performance in the last six months and would like to attend more frequently, are on average prepared to pay $23.

As noted, a large proportion of the symphonic audience are subscription ticket holders. The price paid for a subscription series, however, varies considerably, although the number of performances in a package does not. The mean amount that subscription ticket holder paid for their ticket is $198, and this is well above the average of $151. In all 22% of subscribers reported paying $300 or more compared to 14% for all traditional performance types. For this higher price, however, subscribers appear to attend more performances. In all, 69% report that their package is for six or more performances and this is well above the average. Thus, when the number of performances in a package is compared with the amount paid it appears that symphonic audiences are receiving more value for their money, at least in terms of the number of performances provided.

Although they pay on average more for their subscription series, symphonic subscribers are little different from other audiences in their willingness to accept increased costs of subscriptions. Only 8% say they would discontinue their subscription rather than pay more. However, there appears to be significant barriers to any substantial increase in series tickets. Fully 43% of symphonic subscription audiences say they are prepared to pay no more than 5% more for their subscription series. The implication here is that while there is some flexibility for increasing subscription costs this flexibility is limited.

Table 3
SYMPHONIC MUSIC AUDIENCE: AMOUNT PAID FOR PERFORMANCE ATTENDED AND AMOUNT PREPARED TO PAY FOR A CLASSICAL MUSIC PERFORMANCE

	GIFT	$10-OR LESS	$11-$15	$16-$19	$20-$24	$25-$29	$30-$39	$40-$49	$50-OR MORE	MEAN AM'T	NOTHING/NOT INTERESTED	NO OPINION
	%	%	%	%	%	%	%	%	%	$	%	%
SYMPHONIC MUSIC AUDIENCE												
Amount paid *	3	14	20	18	19	6	10	2	2	$20	-	6
Amount prepared to pay		6	19	19	29	9	7	5	3	$22	1	2
GENERAL PUBLIC**/Symphonic music attender												
Amount prepared to pay		12	22	16	19	12	7	3	2	$21	4	3

* The categories for the amount paid question are slightly different: Less than $10, $10 - $14, $15 - $19. Thereafter the categories are the same.

** Reported that they attended a symphonic music performance in the last six months.

2.7.5 DEMOGRAPHICS

Survey data suggest that 54% of general public respndents who report attending a symphony performance in the last six months are wormen as are 58% of symphonic audience respondents. This suggests that for symphonic music, unlike dance, the audience while slightly more likely to be female, is generally mixed. (See Table 4)

The audience for symphonic music tends to be middle aged or older. In fact, close to two thirds (63%) of those who were surveyed as part of a symphonic audience are 45 years and over. Moreover, among those who attended at least three performances last season, 76% are within this age group.

Among the general public, while there is a tendency for those who report attending within the last six months to be older, the proportion within the 45 year plus group is much smaller. In all, among the general public, 46% compared to 34% for the population overall are 45 years of age or older. The implication from both sets of data, however, is that symphonic audiences tend to be older.

In keeping with other Traditional performing arts audiences, symphony audiences are also more affluent and better educated. In fact, among symphonic audiences, 27% report household incomes of $75,000 a year compared to 8% among the population overall. (See Table 4)

Although the majority of audiences at symphonic performances appear to be older, and this represents a significant problem in terms of replacement of the existing audience, there is some evidence of interest in symphonic performances by students. Table 4 shows that among those in the general public who have attended a symphonic performance in the last six months, 15% are students.

Given the high level of education among audiences and the apparent interest on the part of students, one implication for audience building is that of developing closer links with the student community.

Consistent with the fact that symphonic audiences are older, analysis of reported attendance by life cycle stage indicates that the core audience for symphonic music is composed of couples whose children have left home and older singles, particularly the widowed. Among symphonic audiences, these two groups represented half the overall audience, and over half (58%) among those who attended at least three performances last season.

Building on the student theme raised above, Table 4 also indicates that young singles and young childless couples do in fact attend performances, although not in the numbers that they represent in the population. Thus while 17% of the symphonic audience are young childless singles, 24% of the population fall into this category. Among the general public, however, young childless singles and young childless couples report themselves as recent attenders in approximately the same proportion that they are represented in the public.

The two different results by age and life cycle regarding young people does present a puzzle. It is possible that, in fact, young singles are attending and simply did not answer the audience questionnaires in the same proportions as their elders. It is also possible that the general public may not be entirely sure what type of performances they attended, or whether they were professional or amateur. At the very least these figures, as they relate to age and life cycle, suggest the possibility that symphonic audiences are getting older and there is no compelling evidence that they may necessarily be replaced by younger audiences.

As with other Traditional performing arts audiences, the large group of young parents, who demographically represent the largest proportion of the population, are relatively absent from the concert hall. Presumably the demands of parenting gives this group limited flexibility and limited disposable income.

Table 4
SYMPHONIC MUSIC: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	SYMP. MUSIC AUDIENCE %	DID NOT ATTEND %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %	GENERAL PUBLIC TOTAL %	NEVER ATTENDED %	ATTENDED IN LAST 5 YEARS %	ATTENDED IN LAST 6 MONTHS %
GENDER								
Male	41	41	42	40	49	50	46	46
Female	58	57	57	58	51	50	54	54
AGE								
16 - 24 years	8	11	16	5	16	16	17	15
25 - 34 years	9	12	13	7	26	28	25	18
35 - 44 years	15	20	22	12	24	24	27	21
45 - 54 years	18	19	18	18	14	14	13	16
55 - 64 years	21	14	14	24	10	10	9	16
65 years or older	24	24	18	34	10	9	9	14
HOUSEHOLD INCOME								
Less than $10,000	7	12	9	5	7	7	7	5
$10,000 - $19,999	7	12	6	7	14	15	11	10
$20,000 - $29,999	5	7	3	5	18	19	14	15
$30,000 - $39,999	12	8	8	15	17	18	13	14
$40,000 - $49,999	15	13	16	15	18	18	17	17
$50,000 - $59,999	10	9	15	9	11	11	10	14
$60,000 - $74,999	18	20	20	18	8	7	10	10
$75,000 or more	25	19	23	27	8	6	17	15
EDUCATION: Highest level								
Lees th. high sch.	2	4	5	1	20	21	7	6
High school diplo.	24	21	27	23	27	30	13	15
College	23	26	20	23	17	17	17	15
Some university	-	-	-	-	7	7	9	11
Bachelor's degree	25	23	26	25	12	10	22	24
Grad/Prof. degree	25	24	22	27	6	4	14	14
Student	-	-	-	-	11	10	17	15
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	17	24	24	13	24	25	28	24
Married, under 45, no child. at home	5	5	6	4	10	10	14	8
Married, under 45, child. present	8	11	15	5	29	31	24	19
Single parent	4	4	9	3	4	4	4	5
Married, 45 and +, child. present	15	12	10	17	9	9	10	10
Married, 45 and +, no child. at home	30	24	27	33	15	14	12	22
Single, 45 and +, no child. at home	20	19	9	25	8	8	8	12

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.8 Symphonic "Pops"

2.8.1 ATTENDANCE PATTERNS

While the symphonic music audience appears to be made up of people who attend a number of other types of "classical" music performance, this, on the surface, appears to be less the case with symphonic "pops." Audiences for other "classical" music performances report that they are less likely to be a part of the audience for "pops" music. Thus, while 32% of symphonic audiences report attending a symphonic "pops" concert, 67% of a symphonic "pops" audience report attending a symphonic concert. An obvious question is one of the extent to which this is a problem of nomenclature, as may partially be the case. Symphonic audiences may not define "pops" concerts as "pops," but as symphonic concerts. However, it also appears to be the case that symphonic "pops" audiences are a subset of the symphonic audience, that is, a part of the symphonic audience goes to "pops" concerts. It does not appear then that the "pops" audience are a very different audience than is being tapped by the symphony regularly. The evidence for this comes from the fact that 72% of those surveyed at "pops" concerts report that they attended a symphonic concert during the last complete season. If there is a difference, it is that "pops" audiences are somewhat less likely than other "classical" music audiences to attend other types of "classical" performances. Having said this, however, they are still more likely than other traditional audiences to attend "classical" performances. For example, 36%, 35%, 26% and 44% of "pops" audiences report, respectively, attending contemporary classical, chamber/soloists, opera, or choral performances during the last complete season.

To summarize, the data suggest that "pops" audiences are not a new audience, but a subset of the symphonic audience and that part of the audience that probably like their "classics" a little lighter, given the lower level of attendance for other "classical " types.

Assuming that the general public is likely to be somewhat confused over the distinction between symphonic music and symphonic "pops," the figures for attendance at symphonic "pops" performances must be treated with some caution.

In all, 17% of the general public report that they have at some time attended a "pops" concert. Of this 17%, just under half (8%) say they have attended a "pops" concert in the last six months. This is comparable with the size of the audience for ballet, but well-below that for theatre.

The audience for "pops" concerts also does not appear to be especially consistent. Fully a third of those surveyed at a "pops" concert report that they did not attend a similar type concert in the last complete season. Those who do attend, however, do so on a regular basis; 43% report attending at least three performances during the last complete season.

In many respects, the symphonic "pops" type is a poor relative to symphonic music. Many more among the general public indicate an interest in symphonic music than in "pops." (The "pops" category was not included in the audience survey regarding interest in attending specific types of performances.) In general, approximately a quarter of each traditional type indicate interest in attending symphonic "pops" concerts. This compares with the level of interest (30%-50%) of other Traditional types for symphonic

music performances. Even among other "classical" types of performances, interest in attending "pops" concerts is no greater than for those audiences attending other types of Traditional performances. Similarly Popular performing arts audiences also express limited interest in attending "pops" performances and, in fact, less interest than for symphonic performances. This appears to indicate that "pops" concerts may not be the best way to attract new audiences to the mainstream symphonic repertoire, and that attracting the public on the basis of the symphonic repertoire may be a better route. This issue is explored further in the next section.

Finally, the maximum market for "pops" appears to be less than that for symphonic music overall. In all, 73% among the general public have never attended a "pops" concert and have no interest in attending. This suggests that the maximum market is about a quarter of the population. At the present time 8% of the general public report that they have attended a "pops" concert in the last six months.

2.8.2 EXPECTATIONS AND PERCEPTIONS

Although "pops" audiences appear to be a subset of the symphonic audience, as noted above, they prefer a "lighter" type of music. They also seem to have somewhat different expectations about a performance than do symphonic audiences. This is evident from Table 1, which shows responses to a series of agree/disagree statements about classical music.

Like symphonic audiences, "pops" audiences tend not to be especially likely to go to performances to specifically hear a piece of music or see a particular soloist or conductor. This suggests a general interest in "pops" performances. This interest, though, may not necessarily be driven by an overwhelming interest in "classical" music. Only 29% of "pops" audiences strongly reject the idea that they usually don't bother to find out the name of a composer when they hear a piece of classical music.

There are two specific features that "pops" audiences, like their symphonic counterparts, reject. The first is an interest in contemporary classical music. In all, 17% of "pops" audiences agree with the position that they would attend more concerts if they played more contemporary classical music. Further, 9% accept the idea that they prefer listening to classical music featuring a soloist or small group rather than an orchestra.

Like their symphonic counterparts, "pops" audiences report that they prefer their classical music "soft and peaceful." In all, 62% of the "pops" audience agree with this, compared to 52% among their symphony attender counterparts.

Consistent with the idea that "pops" audiences are a subset of the symphonic audience, 43% agree that they prefer to attend "pop" concerts of classical music. In comparison, only 14% of the symphonic audience agree with this position. The remaining "pops" audience are undecided (26%) or disagree (29%). However, the fact that 43% agree with this position, and a quarter strongly, does suggest that at least some of the "pops" audience are not a subset of the symphonic audience.

Table 1

SYMPHONIC "POPS" AUDIENCE: STATEMENTS ABOUT CLASSICAL MUSIC

	Agree strongly	Agree somewhat	Agree/ Disagree slightly	Somewhat Disagree	Strongly Disagree	No opinion
Like classical music that is soft and peaceful						
Total audience	27	28	28	8	5	3
Traditional audience	27	28	28	9	6	3
Pops audience	31	31	24	8	2	3
Like classical music but find going to concerts too formal						
Total audience	5	13	31	16	30	4
Traditional audience	4	11	29	17	35	3
Pops audience	3	10	29	17	38	4
When you hear a piece of classical music you don't usually bother to find out who the composer is						
Total audience	8	13	29	19	27	3
Traditional audience	6	11	27	20	32	3
Pops audience	6	14	32	15	29	5
Generally you go to a concert to hear a performance of a particular piece of music you like						
Total audience	15	25	35	13	8	4
Traditional audience	15	25	36	13	7	4
Pops audience	16	22	38	13	8	4
When you go to a concert it is usually because you want to hear a particular soloist or conductor						
Total audience	11	21	37	16	11	4
Traditional audience	11	21	38	16	10	4
Pops audience	14	20	39	16	7	3
You prefer to attend "pops" concerts of classical music						
Total audience	9	12	32	18	25	2
Traditional audience	8	10	30	20	28	4
Pops audience	26	17	26	16	13	3
You would go to more concerts if they played more contemporary classical music						
Total audience	5	9	37	22	23	5
Traditional audience	4	8	35	23	26	4
Pops audience	6	11	33	20	24	5
You generally prefer listening to classical music featuring a soloist or small group, rather than an orchestra						
Total audience	6	10	36	25	18	4
Traditional audience	6	10	36	25	19	4
Pops audience	3	6	32	27	28	4

Finally, in terms of the agree/disagree statements, there is some evidence that some among the "pops" audience find the atmosphere at concerts "too formal." In all, four-in-ten either agree (13%) or are undecided (29%) on this issue. However, this is not a major barrier to attendance, as evidenced by the small level of agreement.

Just as their demands for "classical" music are for a "softer" music, and they do not appear to be especially motivated by any particular type of material, "pops" audiences are also somewhat different in their other expectations of a performance.

Thus, "pops" audiences are the most likely to identify as their most important expectations that the performance allows them to forget their problems and that it makes them feel good: 67% and 68%, respectively (well above average), cite these as important expectations. Among the public reporting attendance at a "pops" concert in the last six months, differences by expectation are limited. However, *forgetting problems* and *feeling good* receive the strongest endorsements, in addition to that of a *performance being entertaining*. (This latter item was not included as a category in the audience survey.)

2.8.3 TICKET PURCHASING AND SUBSCRIPTION ISSUES

Like other Traditional audiences, "pops" audiences are likely to use the box office almost exclusively to purchase single tickets, at least the ticket(s) they purchased for the performance at which they were surveyed. In most cases, these tickets were purchased in person, although as noted in the overview there is some demand to purchase tickets by phone.

Together with symphonic audiences, "pops" audiences are the most likely to report that they have subscription tickets for the performance at which they were surveyed. Close to two thirds of "pops" audiences report themselves as subscribers.

2.8.4 PRICING ISSUES

The mean amount that "pops" audiences report paying for a single ticket is close to that of the figure reported for symphonic audiences, $22 compared to $20. The somewhat higher figure that "pops" audiences report paying is a result of more people in the symphonic audience purchasing tickets under $15, 34% compared to 15% among the "pops" audience.

Although they pay more for their tickets than symphonic and Traditional performing arts audiences, "pops" audiences are somewhat more resistant to the idea of paying more for single tickets. Twenty percent, compared to 15% among the symphonic audience say they would not attend if ticket prices were any higher, while a third (34%) are not prepared to pay any more than $2 more for a single ticket.

Further evidence for believing that there is some resistance to price increases among "pops" audiences is that, as Table 3 points out, the mean amount they are prepared to pay to attend a "pops' performance is below the amount reported paid for a single ticket for the performance at which they were surveyed, $21 compared to $22.

Among the general public, the mean amount that recent attenders at a "pops" concert are prepared to pay is $20. This lower mean is largely a function of the substantial proportion of recent attenders who are only prepared to pay $15 or less for a ticket to a "pops" concert.

As with other types, those who attend most frequently among the audiences are more likely to report being prepared to pay a higher average price per single ticket. Among those reporting attending at least three "pops" concerts in the last complete season, the mean amount is $22.

Among the general public, the mean amount prepared to pay among recent attenders who would like to attend more frequently is $20.

Although, as reported by audiences, ticket prices for symphonic performances are somewhat lower than those reported for "pops" performances, the same is not the case in terms of the reported price paid for subscription. Table 2 notes that 69% of "pops audiences paid under $200 for their subscription series, compared to 59% saying this among the symphonic audience. More surprising is the fact that this lower price appears to feature a larger number of concerts in the series. Overall, 80% of "pops" audiences report six or more performances in their package, while only 69% of symphonic audiences say this.. However, as was the case with price increases for single tickets, "pops" audiences are again more resistant than symphonic audiences to price increases. Thirteen percent (13%) among "pops"audiences say they would discontinue subscribing if the price were to increase. Similarly, over half (52%) of the "pops" audiences surveyed for this study would stop at paying more than a 5% increase for their subscription. This is well above the proportion of symphonic audiences who report this (43%).

Table 2

SYMPHONIC "POPS" AUDIENCE: TICKET AND SUBSCRIPTION PRICE ISSUES

	"POPS" AUDIENCE %	TRADITIONAL AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	6	9	10
$10 - $14	9	19	18
$15 - $19	16	25	21
$20 - $24	40	17	15
$25 - $29	10	9	9
$30 - $34	0	4	5
$35 - $39	1	2	3
$40 - $49	2	3	3
$50 - $74	1	2	4
$75 or more	1	1	2
Gift	5	4	4
No opinion	8	6	6
Mean amount	$22	$21	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	34	27	28
$4.00 higher	23	22	21
$6.00 higher	11	10	10
$10.00 higher	13	14	14
NOT ATTEND IF ANY HIGHER:	20	16	17
No opinion	13	11	10
AMOUNT PAID FOR YEAR'S SUBSCRIPTION:			
Less than $50	4	13	15
$50 - $99	12	26	22
$100 - $199	43	30	30
$200 - $299	22	15	14
$300 - $399	12	7	6
$400 or more	7	7	6
No opinion	19	18	19
Mean amount	$200.22	$159.06	$151.08
NUMBER OF PERFORMANCES IN SUBSCRIPTION:			
3 performances	4	7	8
4 performances	4	16	17
5 performances	13	23	25
6 or more performances	80	52	50
No opinion	31	27	28
CONTINUE WITH SUBSCRIPTION IF PRICES INCREASED BY:			
5%	52	42	43
10%	23	26	26
15%	13	22	23
Would discontinue	13	9	9
No opinion	16	15	16

* Those questions with *no opinion* above 10% have been recalculated to exclude the *no opinions*.

Table 3

**SYMPHONIC "POPS" AUDIENCE:
AMOUNT PAID FOR PERFORMANCE ATTENDED AND AMOUNT PREPARED TO PAY FOR A CLASSICAL MUSIC PERFORMANCE**

	GIFT	$10- OR LESS	$11- $15	$16- $19	$20- $24	$25- $29	$30- $39	$40- $49	$50-OR MORE	MEAN AMT	NOTHING/ NOT INTERESTED	NO OPINION
	%	%	%	%	%	%	%	%	%	$	%	%
POPS AUDIENCE												
Amount paid *	5	6	9	16	40	10	1	2	2	$22	-	8
Amount prepared to pay	-	6	17	21	28	10	6	2	1	$21	3	7
GENERAL PUBLIC**/ "Pops"attender												
Amount prepared to pay	-	13	18	15	13	10	5	2	2	$20	18	4

* The categories for the amount paid question are slightly different: Less than $10, $10 - $14, $15 - $19. Thereafter the categories are the same.

** Reported that they attended a symphonic "pops" performance in the last six months.

2.8.5 DEMOGRAPHICS

Although the audience surveyed at "pops" concerts is disproportionately female (59%), the general public who report attending a "pops" concert is more evenly split (51% male and 49% female). The implication here is that the audience is likely evenly divided by gender.

Much the same division in findings between the audience and general public surveys is also found with respect to age. Among audiences, older Canadians dominate with 51% of those attending a performance during the last complete season reporting that they are over 54 years of age. Among the most frequent attender group, a significant 67% report being 55 years of age or older.

No such reported finding is apparent among the general public. In fact, it is among the youngest age group where attendance appears greatest. In all, 28% of those reporting that they attended a symphonic "pops" concert are between the ages of 16 to 24 years. There are a number of likely explanations for this difference. Chief among them is the extent to which the general public is correctly identifying the performance they attended as symphonic "pop." It is possible, although unlikely, that a number of young people are answering the "pops" question in terms of pop/rock performances. Another possible explanation, and probably the most likely, is that young people are seeing the performance they are reporting through their school or college. In fact, 24% of those who report that they are recent attenders of a "pops" concert are students.

The confirmation of the age relationships discussed above is evident when life cycle stage is considered. Among the "pops" audience, fully 43% report that they are older

childless couples ("empty nesters"), whereas the general public survey revealed that only 15% of the population was at this stage in their life. Similarly, the 23% of frequent attenders among the "pops" audience is well above the proportion cited in the general population at this stage (15%).

Among young people in the general public survey, those attending most recently are young singles without children.

Just as with other performance types, the most notable absence of a life stage group from performances is among young couples with children. These groups are considerably underrepresented, although it is clear that they have attended "pops" concerts at some point in the past five years.

Finally, consistent with audiences for other types, "pops" audiences and recent attenders among the general public are well above average in household income and education level. Interestingly, however, "pops" audiences and recent attenders in the general public are not quite as affluent nor do they have the same level of education as symphonic music audiences and recent attenders among the public.

Table 4
SYMPHONIC POPS: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	SYMPH. POPS AUDIENCE %	DID NOT ATTEND %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %	GENERAL PUBLIC TOTAL %	NEVER ATTENDED %	ATTENDED IN LAST 5 YEARS %	ATTENDED IN LAST 6 MONTHS %
GENDER								
Male	39	38	43	37	49	49	45	49
Female	59	51	56	60	51	51	55	51
AGE								
16 - 24 years	9	10	19	3	16	14	20	28
25 - 34 years	7	10	9	4	26	27	26	24
35 - 44 years	14	16	16	11	24	25	24	15
45 - 54 years	18	20	20	16	14	14	12	12
55 - 64 years	21	14	22	26	10	10	10	11
65 years or older	30	29	13	41	10	10	8	11
HOUSEHOLD INCOME								
Less than $10,000	10	10	12	8	7	7	7	5
$10,000 - $19,999	9	12	7	8	14	14	10	11
$20,000 - $29,999	2	2	0	5	18	18	16	18
$30,000 - $39,999	10	11	11	8	17	17	15	17
$40,000 - $49,999	17	22	16	12	18	18	17	17
$50,000 - $59,999	14	14	15	14	11	11	11	11
$60,000 - $74,999	17	18	14	20	8	8	9	9
$75,000 or more	20	11	25	25	8	7	15	12
EDUCATION: Highest level								
Less th. high sch.	4	3	6	5	20	20	10	7
High school diplo..	32	27	31	37	27	28	18	22
College	25	23	28	24	17	17	19	13
Some university	-	-	-	-	7	7	11	8
Bachelor's degree	21	27	20	16	12	12	17	18
Grad/Prof. degree	17	18	14	18	6	5	9	9
Student	-	-	-	-	11	10	15	24
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	13	17	22	4	24	22	30	36
Married, under 45, no child. at home	7	8	11	5	10	10	12	10
Married, under 45, child. present	8	8	9	8	29	31	26	18
Single parent	5	6	5	3	4	5	4	3
Married, 45 and +, child. present	14	17	13	13	9	9	9	8
Married, 45 and +, no child. at home	31	23	20	43	15	15	12	14
Single, 45 and +, no child. at home	22	21	20	23	8	8	7	11

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.9 Chamber Music and Classical Soloists

2.9.1 Attendance Patterns

Few (10%) among the public report that they have been exposed to performances of chamber music or to classical soloists. The current audience, based on general public figures, appears to be about 5% of the population. The majority of the audience, however, appear to be regular attenders of performances; 77% in attendance at the performance surveyed indicated that they had attended at least one performance during the last complete season.

Like other Traditional performing arts audiences, chamber/soloists audiences attend a variety of other performance types. In particular, drama (56%), theatre-comedy (44%), symphonic music (71%), and choral music (44%) were all attended in this last complete season by a substantial proportion of the chamber/soloists audience. The large proportion who report attending symphonic performances also suggests that this audience is also a subset of the symphonic audience.

In determining where increased audiences for chamber/soloists are likely to come from, one clue is obviously the extent to which other audience types attend chamber/soloist performances. The main audiences indicating that they attended a chamber/soloist performance in the last complete season are other "classical" music audiences. In particular, large proportions of symphonic (48%), symphonic "pops" (35%), contemporary classical (54%), opera (46%) and choral (55%) audiences all report attendance at chamber/soloist performances. There is also some reported attendance by jazz/blues (37%) audiences.

Confirmation of the interest these audiences have in chamber/soloist performances is also found in the fact that it is audiences for other "classical" performances who are the most likely to express interest in attending more chamber/soloists performances.

There are, however, limits to the size of the chamber/soloist audience, at least in terms of what the public understands by this performance type. Overall, 85% of the public indicate that they have neither attended a performance nor are they interested in attending. There may also be limits to the present audience in terms of the demand for more performances. Most of those attending chamber/soloist performances report that they are content with their present level of attendance. In fact, fully 75% of those surveyed at chamber/soloist performances indicate that they are content with their present level of attendance. By a two-to-one margin, those who report attending at least three chamber/soloist performances in the last year, say they attend as many performances as they wish.

2.9.2 Expectations and Perceptions

In general this audience's perceptions, as described by their responses to a series of agree/disagree statements, are quite similar to that of the symphonic audience.

As Table 1 indicates, many in this audience, like the symphonic audience, do not attend performances because they necessarily want to hear a particular piece of music or even

because they want to see a specific soloist. In fact, on this latter point only 40% agree with this statement, and only 15% strongly agree.

Also, like symphonic audiences, their preference for classical music does not extend to the "pops" and neither are they attracted to contemporary classical music.

Surprisingly, given the small size of the ensemble for chamber music, this audience does not indicate any strong preference for classical music featuring a soloist or a small group. In all, only 26% agree that this is their preference. This latter response, confirms the suggestion made above that this audience is really a subset of the symphonic audience who, in addition, enjoy soloists and chamber music performances.

Chamber/soloist audiences have a number of expectations of a performance. They expect the performance to have a strong emotional impact, but at the same time believe a performance should allow them to forget problems as well as make them feel good. There is also some expectation that a performance would allow them insight into who they are. In this regard, there is some evidence that some members of the chamber/soloist audience are like avant-garde audiences and believe a performance should have the potential to provide a transformative experience.

2.9.3 Ticket Purchasing and Subscription Issues

Like most other audiences, this audience also makes extensive use of the box office to purchase single tickets. Two thirds report using this source for ticket purchasing, and most of this group report going in person to the box office. While the box office is clearly the preferred place for ticket purchasing, like other audiences, many in the chamber/soloist audience would prefer to purchase tickets from the box office, but by phone.

Chamber and soloist audiences are, together with symphonic and "pops" audiences, the most likely to report having subscription tickets for the performance at which they were surveyed. In all, 56% reported that they are subscribers. Moreover, most (81%) members of the chamber/soloists audience report experience with subscription tickets.

2.9.4 Pricing Issues

In general, single ticket prices reported by this audience are lower than for most other types. In fact, close to half (48%) report spending less than $15 on a ticket (See Table 2). Possibly because ticket prices paid are relatively low, the mean amount that chamber/soloist audiences say they are prepared to pay is a good deal higher, (on average $21), than the actual mean amount paid ($15). The willingness to pay more, however, may not be for a chamber/soloist concert as the question on willingness to pay asked generically about classical music. The figure of $21, however, does suggest that for performances they value, audiences are prepared to pay a good deal more than they do at present.

Not unexpectedly, those who attend chamber/soloist performances the most frequently are the most willing to pay the highest amounts for a classical music performance.

Table 1

CHAMBER/SOLOISTS AUDIENCE: STATEMENTS ABOUT CLASSICAL MUSIC

	Agree strongly %	Agree somewhat %	Agree/ Disagree slightly %	Somewhat Disagree %	Strongly Disagree %	No opinion %
Like classical music that is soft and peaceful						
Total audience	27	28	28	8	5	3
Traditional audience	27	28	28	9	6	3
Chamber/Soloist audience	26	24	29	10	7	4
Like classical music but find going to concerts too formal						
Total audience	5	13	31	16	30	4
Traditional audience	4	11	29	17	35	3
Chamber/Soloist audience	2	7	21	18	49	3
When you hear a piece of classical music you don't usually bother to find out who the composer is						
Total audience	8	13	29	19	27	3
Traditional audience	6	11	27	20	32	3
Chamber/Soloist audience	3	7	15	23	49	2
Generally you go to a concert to hear a performance of a particular piece of music you like						
Total audience	15	25	35	13	8	4
Traditional audience	15	25	36	13	7	4
Chamber/Soloist audience	14	25	37	15	7	3
When you go to a concert it is usually because you want to hear a particular soloist or conductor						
Total audience	11	21	37	16	11	4
Traditional audience	11	21	38	16	10	4
Chamber/Soloist audience	15	25	39	13	6	2
You prefer to attend "pops" concerts of classical music						
Total audience	9	12	32	18	25	
Traditional audience	8	10	30	20	28	4
Chamber/Soloist audience	5	8	24	20	42	2
You would go to more concerts if they played more contemporary classical music						
Total audience	5	9	37	22	23	5
Traditional audience	4	8	35	23	26	4
Chamber/Soloist audience	5	9	37	22	23	5
You generally prefer listening to classical music featuring a soloist or small group, rather than an orchestra						
Total audience	6	10	36	25	18	4
Traditional audience	6	10	36	25	19	4
Pops audience	10	16	38	20	13	2

Among those in the audience who attended at least three such performances in the last season, the average amount this group is prepared to pay is $25.

The willingness to pay more for a chamber/soloist concert is, however, confirmed by the fact that less than one-in-five (18%) report that they are not prepared to pay more for a

single ticket to a performance, while 82% are prepared to pay at least $2 more, and 55% are prepared to pay at least $4 more. Overall then, an increase in the $2 to $4 range appears to be generally acceptable.

As noted above, a majority (56%) report holding subscription tickets for the performance attended. And as with single ticket prices, the amount paid for a subscription series is quite low. Fifty-eight percent (58%) of chamber/soloist subscribers report paying less than $100. Moreover, the number of performance that this amount purchases is significant, with over six-in-ten reporting six or more performances in their package. Compared with subscription series in general, as Table 2 shows, the amount paid for the series is lower than average and the number of performances is higher; this suggests high value for money relative to other types.

Again, possibly because subscription prices are so low, and as in the case of single tickets, there is some flexibility in raising subscription prices. Only 5% say they would discontinue their subscription if prices were raised, and 63% report that they are prepared to pay a 10% increase (See Table 2).

2.9.5 DEMOGRAPHICS

Both among audiences and attenders among the general public, women are somewhat more likely than men to report attendance at a chamber/soloist concert (See Table 4). The disproportion of men to women is, though, not great among recent attenders in the general public since 54% of this group are female.

The audience for chamber/soloist concerts is well above average in age. Among the audience, 55% are aged 55 years and above, while among recent attenders in the general public, 30% are above this age. The life cycle data, also shown in Table 4, confirm the life cycle situation of audiences and recent attenders among the general public. Thus among audiences, the largest life stage groups are "empty nesters" (31%) and older singles (26%). The general public results do not show the same disproportions in attendance, but even among recent attenders in the general public, 22% are "empty nesters", and 13% older singles. The other large groups among the general public are young childless singles, and 23% of recent attenders are in this category and young married with children (19%). The large proportion of the young childless singles in the recent attenders general public population may be a function of young people being less able to define clearly what is a chamber or classical soloist performance.

As with many other audiences for Traditional types the chamber/soloist audience is relatively affluent and well educated. In fact, among audiences the more regular attenders are easily the best educated: 43% of all audiences report a second or professional degree.

Some confirmation for the fact that young people may be attending performances comes from the fact that among the recent attenders group in the general public, 18% are students. Possibly some have seen chamber/soloist type performances through their place of education.

Table 2

CHAMBER MUSIC AND CLASSICAL SOLOISTS AUDIENCE: TICKET AND SUBSCRIPTION PRICE ISSUES

	TOTAL CHAMB/SOLOI. AUDIENCE %	TOTAL TRADITIONAL AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	18	9	10
$10 - $14	30	19	18
$15 - $19	24	25	21
$20 - $24	14	17	15
$25 - $29	2	9	9
$30 - $34	1	4	5
$35 - $39	0	2	3
$40 - $49	1	3	3
$50 - $74	0	2	4
$75 or more	1	1	2
Gift	11	4	4
No opinion	12	6	6
Mean amount	$15	$21	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	28	27	28
$4.00 higher	21	22	21
$6.00 higher	10	10	10
$10.00 higher	14	14	14
NOT ATTEND IF ANY HIGHER:	18	16	17
No opinion	18	16	17
AMOUNT PAID FOR YEAR'S SUBSCRIPTION:			
Less than $50	27	13	15
$50 - $99	31	26	22
$100 - $199	30	30	30
$200 - $299	7	15	14
$300 - $399	3	7	6
$400 or more	2	7	6
No opinion	20	18	19
Mean amount	$104.53	$159.66	$151.08
NUMBER OF PERFORMANCES IN SUBSCRIPTION:			
3 performances	3	7	8
4 performances	16	16	17
5 performances	19	23	25
6 or more performances	62	52	50
No opinion	29	27	28
CONTINUE WITH SUBSCRIPTION IF PRICES INCREASED BY:			
5%	32	42	43
10%	30	26	26
15%	33	22	23
Would discontinue	5	9	9
No opinion	19	15	16

* Those questions with *no opinion* above 10% have been recalculated to exclude the *no opinions*.

Table 3

CHAMBER MUSIC AND CLASSICAL SOLOISTS AUDIENCE: AMOUNT PAID FOR PERFORMANCE ATTENDED AND AMOUNT PREPARED TO PAY FOR A CLASSICAL MUSIC PERFORMANCE

	GIFT %	$10- OR LESS %	$11- $15 %	$16- $19 %	$20- $24 %	$25- $29 %	$30- $39 %	$40- $49 %	$50-OR MORE %	MEAN AMT $	NOTHING/ NOT INTERESTED %	NO OPINION %
CHAMBER/SOLIST AUDIENCE												
Amount paid *	11	18	30	24	14	2	1	1	1	$15	0	18
Amount prepared to pay	-	12	18	16	26	8	7	4	2	$21	1	6
GENERAL PUBLIC**/Soloist /chamber Attender												
Amount prepared to pay	-	13	24	18	17	10	5	3	2	$20	6	2

* The categories for the amount paid question are slightly different: Less than $10, $10 - $14, $15 - $19. Thereafter the categories are the same.

** Reported that they attended a chamber/soloist performance in the last six months.

Table 4
CHAMBER MUS. & . SOLOISTS: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	CH. MUSIC & SOLOISTS AUDIENCE %	DID NOT ATT. %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %	GENERAL PUBLIC TOTAL %	NEVER ATTENDED %	ATTENDED IN LAST 5 YEARS %	ATTENDED IN LAST 6 MONTHS %
GENDER								
Male	39	36	39	41	49	49	48	46
Female	60	61	60	58	51	51	52	54
AGE								
16 - 24 years	10	10	12	7	16	16	15	15
25 - 34 years	10	9	13	7	26	27	22	17
35 - 44 years	15	12	20	12	24	24	25	20
45 - 54 years	19	18	19	19	14	13	15	19
55 - 64 years	21	21	17	25	10	10	12	16
65 years or older	25	30	19	30	10	10	10	14
HOUSEHOLD INCOME								
Less than $10,000	8	6	12	5	7	7	6	6
$10,000 - $19,999	9	13	6	10	14	14	9	12
$20,000 - $29,999	4	4	2	7	18	18	16	14
$30,000 - $39,999	13	18	11	12	17	17	13	15
$40,000 - $49,999	12	21	11	9	18	18	16	18
$50,000 - $59,999	10	3	14	8	11	11	11	13
$60,000 - $74,999	17	14	17	19	8	8	11	10
$75,000 or more	26	21	26	28	8	8	16	12
EDUCATION: Highest level								
Less th. high sch.	3	7	2	1	20	19	10	5
High school diplo.	18	22	20	15	27	28	10	14
College	19	25	17	17	17	18	13	12
Some university	-	-	-	-	7	7	10	10
Bachelor's degree	26	24	30	23	12	11	24	25
Grad/Prof. degree	34	22	31	43	6	5	19	16
Student	-	-	-	-	11	11	14	18
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	17	14	23	13	24	24	25	23
Married, under 45, no child. at home	8	7	9	6	10	11	10	7
Married, under 45, child. present	8	9	11	4	29	30	24	19
Single parent	5	4	4	7	4	4	5	4
Married, 45 and +, child. present	12	14	11	13	9	9	10	13
Married, 45 and +, no child. at home	28	27	26	31	15	15	14	22
Single, 45 and +, no child. at home	21	25	15	26	8	8	12	13

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.10 Contemporary Classical

2.10.1 Attendance Patterns

In many ways, the contemporary classical audience[1] is like the symphonic "pops" audience in that it appears to be a subset of the symphonic audience. For example, two thirds of the contemporary classical audiences surveyed indicate that they had attended a symphonic performance in the last complete season. This is, in fact, a larger proportion than indicate that they had attended a contemporary classical performance in the same time period (67% to 59%). Further evidence that this is a "classical" oriented audience comes from the fact that 54% and 51% report attending chamber/soloists and choral performances in the last complete season.

Although this audience is concerned with the avant-garde in music, they are not especially likely to be found at contemporary dance or experimental theatre performances. However, more of them attend these types of performances than other "classical" music audiences.

Outside of "classical" music, this audience's main interest appears to be drama, theatre-comedy, jazz/blues performances and musicals: 63%, 49%, 43% and 45%, respectively, report attending these performances in the last complete season.

Comparisons with the general public regarding attendance are not possible because this category was not included in the general public survey. The main reason for this exclusion is that focus group research among the public indicated a difficulty in differentiating contemporary classical music from symphonic music and other forms of classical music. This means that the potential size of the audience cannot be accurately determined.

2.10.2 Expectations and Perceptions

The contemporary classical audience has many of the same preferences as the symphonic audience, in terms of agreement/disagreement with the statements measuring preferences, but at the same time there are some significant differences.

They are similar, as Table 1 points out, in that the content of the performance, in terms of the pieces being played, and the soloists or conductor, while important, are not very strong factors drawing the audience to a performance. And as with symphonic audiences, this audience is not greatly interested in attending "pops" concerts.

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1 The classical contemporary music sample was created with by far the smallest number of collections (7) of every traditional performing arts type, as supply for such productions was low in most populated areas and practically nonexistant in other zones. The reader must know that symphonic works could not be surveyed per se and are not part of the classical contemporary music sample, as they are usually programmed in Orchestra's main series among classical, romantic or modern repertoire. The performances sample includes a majority of programs from improvisational/electro-acoustic/minimal schools as well as some contemporary chamber music programs.

They are different from symphonic audiences in that they are more likely to agree that they prefer classical music featuring soloists or a small orchestra. A total of 26% agree with this statement compared to 11% among the symphonic audience.

Table 1

CONTEMPORARY CLASSICAL AUDIENCE: STATEMENTS ABOUT CLASSICAL MUSIC

	Agree strongly %	Agree somewhat %	Agree/ Disagree slightly %	Somewhat Disagree %	Strongly Disagree %	No opinion %
Like classical music that is soft and peaceful						
Total audience	27	28	28	8	5	3
Traditional audience	27	28	28	9	6	3
Cont. Classical audience	18	19	34	15	11	2
Like classical music but find going to concerts too formal						
Total audience	5	13	31	16	30	4
Traditional audience	4	11	29	17	35	3
Cont. Classical audience	2	9	27	27	35	1
When you hear a piece of classical music you don't usually bother to find out who the composer is						
Total audience	8	13	29	19	27	3
Traditional audience	6	11	27	20	32	3
Cont. Classical audience	2	5	22	24	44	3
Generally you go to a concert to hear a performance of a particular piece of music you like						
Total audience	15	25	35	13	8	4
Traditional audience	15	25	36	13	7	4
Cont. Classical audience	13	30	36	11	5	4
When you go to a concert it is usually because you want to hear a particular soloist or conductor						
Total audience	11	21	37	16	11	4
Traditional audience	11	21	38	16	10	4
Cont. Classical audience	10	24	41	17	7	1
You prefer to attend "pops" concerts of classical music						
Total audience	9	12	32	18	25	2
Traditional audience	8	10	30	20	28	4
Cont. Classical audience	5	8	24	20	42	2
You would go to more concerts if they played more contemporary classical music						
Total audience	5	9	37	22	23	5
Traditional audience	4	8	35	23	26	4
Cont. Classical audience	12	14	30	24	21	1
You generally prefer listening to classical music featuring a soloist or small group, rather than an orchestra						
Total audience	6	10	36	25	18	4
Traditional audience	6	10	36	25	19	4
Cont. Classical audience	10	16	38	20	13	2

More importantly, they are substantially less likely to agree that they like their classical music "soft and peaceful." Only 37% of the contemporary classical audience agree with this position compared to 52% among symphonic audiences.

Finally in terms of the agree/disagree statements, there is some question as to the extent to which those attending the contemporary classical performances surveyed are deeply committed to contemporary classical music or the extent to which there is an audience for the music. Only 26% of those at the contemporary classical music performances surveyed agree that they would go to more concerts if more contemporary classical music were performed. Possibly, as a subset of the symphonic audience, this audience is interested in contemporary classical music, but has no great interest in increasing frequency of attendance.

As noted, although many in this audience are part of the symphonic audience, they are more likely to have some unique expectations that align them more with other avant-garde audiences rather than with the mainstream symphonic audience.

Specifically, this audience is among the most likely to indicate that one of the most important expectations is that a performance has a strong emotional impact.

Consequently, the contemporary audience tends to downplay the forgetting problems and feel good aspects of a performance, which were so important to the symphonic audiences. Similarly, like other avant-garde audiences, this contemporary classical audience also want a performance to provide them with insight into who they are. This suggests they view their music as going beyond "entertainment" to something that touches them emotionally and provides a meaningful emotional experience. Presumably, this is something they also expect from a symphonic performance. The implication is that while contemporary classical audiences are in large measure oriented more toward "classical" music than the avant-garde in general, they expect something different from a musical experience than other "classical," and especially symphonic, audiences.

2.10.3 Ticket Purchasing and Subscription Issues

Contemporary classical audiences are among the most likely to report purchasing their single tickets in person at the box office. In all, 59% purchased their tickets in this manner. Few used the phone to make a purchase, although as noted earlier, there is some demand for purchasing tickets in this manner.

Few (13%) in the contemporary classical audience report that they had subscription tickets for the performance at which they were surveyed. Clearly, contemporary classical music organizations make limited use of subscription series. However, given the limited interest in this type there may be only small demand for this type of subscription.

Contemporary classical audiences, however, have been exposed to subscription offers and have made use of subscriptions. In all, 70% report recalling being contacted regarding some form of subscription series and 70% are current or past subscribers. However, only 37% are current subscribers to some type of performance series, compared to 67% among those surveyed at a symphonic performance.

2.10.4 PRICING ISSUES

This audience paid little for their ticket, on average only $15 for a single ticket, well-below the average for most other types. There is, however, some flexibility for increasing ticket prices. The average amount contemporary classical audiences say they are prepared to pay is $19 (See Table 3).

When asked if they would attend the performance at which they were surveyed if ticket prices were increased, only one-in-five indicate that they would not. Few, however, appear to be prepared to pay more than another $4 for a single ticket. And, in fact, only 50% of this audience are prepared to go this far. Three-in-four, however, are prepared to pay an extra $2. This suggests some flexibility in increasing prices on average in the $2 to $4 price range.

Although few in the contemporary classical audience had subscription tickets to the performance, those that did have subscriptions report that they paid relatively little for their subscription. Fully 87% report paying less than $100. Moreover, for close to four-in-ten, the series consisted of six or more performances. This suggests a high level of value for money.

There does, however, appear to be two different types of series available. Half of those with a subscription indicate that their series consists of four or fewer performance, while another 42% indicate six or more performances. As noted, even those with six or more performances in their series paid relatively little for their subscription.

Possibly because subscriptions appear to be so reasonably priced, there is a relatively high level of willingness to pay more for a subscription series. Only 5% say they would discontinue if prices increased, while 41% indicated that they would be willing to pay an additional 15%, and 70% indicated a willingness to pay an additional 10%. Clearly, while there are few subscribers, those who do subscribe consider what they get good value for the money and are willing to pay more.

Table 2

CONTEMPORARY CLASSICAL AUDIENCE: TICKET AND SUBSCRIPTION PRICE ISSUES

	CONTEMPORARY CLASSICAL AUDIENCE %	TOTAL TRADITIONAL AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	11	9	10
$10 - $14	40	19	18
$15 - $19	21	25	21
$20 - $24	14	17	15
$25 - $29	1	9	9
$30 - $34	0	4	5
$35 - $39	1	2	3
$40 - $49	1	3	3
$50 - $74	0	2	4
$75 or more	0	1	2
Gift	6	4	4
No opinion	5	6	6
MEAN AMOUNT	**$15**	**$21**	**$23**
ATTEND IF TICKET PRICE:			
$2.00 higher	29	27	28
$4.00 higher	21	22	21
$6.00 higher	10	10	10
$10.00 higher	13	14	14
NOT ATTEND IF ANY HIGHER:	19	16	17
No opinion	8	11	10
AMOUNT PAID FOR YEAR'S SUBSCRIPTION:			
Less than $50	36	13	15
$50 - $99	51	26	22
$100 - $199	12	30	30
$200 - $299	0	15	14
$300 - $399	2	7	6
$400 or more	0	7	6
No opinion	19	18	19
Mean amount	$58.08	$159.06	$151.08
NUMBER OF PERFORMANCES IN SUBSCRIPTION:			
3 performances	23	7	8
4 performances	31	16	17
5 performances	4	23	25
6 or more performances	42	52	50
No opinion	29	27	28
CONTINUE WITH SUBSCRIPTION IF PRICES INCREASED BY: (LARGEST INCREASE PREPARED TO BUY)*			
5%	25	42	43
10%	29	26	26
15%	41	22	23
Would discontinue	5	9	9
No opinion	19	15	16

* Those questions with *no opinion* above 10% have been recalculated to exclude the *no opinions.*

Table 3

CONTEMPORARY CLASSICAL AUDIENCE: AMOUNT PAID FOR PERFORMANCE ATTENDED AND AMOUNT PREPARED TO PAY FOR A CLASSICAL MUSIC PERFORMANCE

	GIFT	$10- OR LESS	$11- $15	$16- $19	$20- $24	$25- $29	$30- $39	$40- $49	$50-OR MORE	MEAN AMT	NOTHING/ NOT INTERESTED	NO OPINION
	%	%	%	%	%	%	%	%	%	$	%	%
CONTEMPORARY CLASSICAL AUDIENCE												
Amount paid *	6	11	40	21	14	1	1	1	0	$15	8	5
Amount prepared to pay	-	10	30	18	20	10	4	1	2	$19	1	4

* The categories for the amount paid question are slightly different: Less than $10, $10 - $14, $15 - $19. Thereafter the categories are the same.

2.10.5 Demographics

Although the audience at the performance surveyed, tended to be female more than male (59% to 41%), regular attenders, that is those attending at last three performances in the last year, are evenly divided by gender (See Table 4). Contemporary classical audiences appear to be close in age to the distribution of the population overall, although frequent attenders appear to be younger than average, with 47% being under age 35. This regular attender group also tends to be single rather than married.

There is also some evidence in Table 4 that this audience also contains a significant proportion of older singles, at least as infrequent members of the audience and "empty nesters."

As far as socio-economic status is concerned, this is not an affluent audience; only 13% compared to 25% among the symphonic audience report household incomes in excess of $75,000. But they are a highly educated audience. Fully 26% have a graduate or professional degree, and 36% have B.A. Frequent attenders are even more likely to have a graduate or professional degree (38%).

Table 4
CONTEMPORARY CLASSICAL MUSIC: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE			
		ATTENDANCE LAST SEASON		
	CONT.CLASS. AUDIENCE TOTAL %	DID NOT ATTEND %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %
GENDER				
Male	41	36	42	50
Female	59	64	58	50
AGE				
16 - 24 years	11	6	15	15
25 - 34 years	24	17	25	32
35 - 44 years	13	11	14	15
45 - 54 years	18	24	14	12
55 - 64 years	19	21	20	12
65 years or older	15	20	12	12
HOUSEHOLD INCOME				
Less than $10,000	9	1	14	14
$10,000 - $19,999	15	17	13	14
$20,000 - $29,999	1	1	0	0
$30,000 - $39,999	15	8	13	28
$40,000 - $49,999	19	17	22	17
$50,000 - $59,999	16	19	15	14
$60,000 - $74,999	13	20	9	8
$75,000 or more	13	15	15	6
EDUCATION: Highest level				
Less th. high sch.	3	4	3	0
High school diplo.	15	19	7	22
College	20	23	20	15
Some university	-	-	-	-
Bachelor's degree	36	34	46	22
Grad/Prof. degree	26	20	24	38
Student	-	-	-	-
LIFE CYCLE STAGE*				
Single, under 45 no child. at home	28	19	30	39
Married, under 45, no child. at home	12	12	14	8
Married, under 45, child. present	4	3	4	8
Single parent	9	7	9	11
Married, 45 and +, child. present	7	10	7	3
Married, 45 and +, no child. at home	17	28	7	13
Single, 45 and +, no child. at home	23	19	30	18

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.11 Choral Music

2.11.1 Attendance Patterns

While few (17%) Canadians report having ever attended a professional choral music performance, based on the responses of audiences, those who constitute the present audience attend relatively regularly. In fact, among the general public, the vast majority (84%) say they have never attended a professional performance of choral music, however, this may due to the relative unavailability of professional choral music outside major centres.

In comparison, just over one quarter (27%) of choral music audiences say they have not attended a performance in the last complete season. While half (49%) of choral music audiences say they attended once or twice in the past season, approximately one-in-four (24%) say they attended at least three performances. In comparison to other traditional performance types, this latter proportion is among the lowest indicating frequent attendance at one of the traditional performance types. Again, this may reflect the infrequent availability of professional choral performances.

Interest in attending choral music performances more frequently is fairly minimal throughout the general public, with approximately one-in-ten (11%) expressing an interest. In comparison with other traditional performance types, similar proportions of the general public express an interest in attending opera, chamber/soloists, theatre-avant-garde and contemporary dance performances.

Among choral music audiences, just over one quarter (27%) express an interest in attending performances more frequently. Those who attended once or twice in the last complete season, are more likely to express an interest in more frequent attendance than are the more frequent attenders, or those who did not attend at all in the past season (14% compared to 8% and 5%, respectively). The challenge then, is to reach those whose contact with choral music is somewhat infrequent.

In seeking to broaden the audience base, obvious segments to develop are those who comprise audiences for other performing arts products. Just as choral music audiences attend a variety of other performance types, so too do other audience types attend choral music performances. Higher proportions of audiences of symphonic music (68%), drama (56%), chamber/soloist music (55%) and opera (41%) report having attended a performance of choral music, relative to audiences at other Traditional performance types.

Interest in attending choral music performances is highest among audiences of symphonic music (38%) and opera (29%). In addition, approximately one-fifth of ballet audiences (21%) and drama audiences (20%) express an interest in attending choral music performances more frequently.

Among the general public, those who have attended a performance of chamber/soloist music (26%) and symphonic music (22%) are among the most likely to express an interest in attending choral music more frequently.

2.11.2 EXPECTATIONS AND PERCEPTIONS

Similar to expectations found among other traditional audience types, the three most frequently cited expectations of a performance by choral music audiences touch upon emotional factors as opposed to specifics of the performance itself. To illustrate, over half of choral music audiences expect a performance to make them feel good (57%), allow them to forget their problems (56%) and to have a strong emotional impact (56%). While significant proportions of the general public expect a performance of choral music to make them feel good (46%) and allow them to forget their problems (41%), far fewer expect the performance to have a strong emotional impact (22%). The most frequently mentioned expectation among the public, however, is that the performance be entertaining (49%) -- a response not offered to audiences.

2.11.3 TICKET PURCHASING AND SUBSCRIPTION ISSUES

Ticket purchasing habits of choral music audiences do not differ greatly from audiences overall, with the exception that fewer choral music audiences purchase their tickets by telephone at the box office, compared with audiences overall (16% compared to 23%, respectively). However, similar to other audience types, the plurality purchase their tickets in person, at the box office (42%).

Relative to some of the other audiences of traditional performance types, a somewhat smaller proportion (37%) of choral music audiences report holding subscription tickets to choral music performances. However, over half (54%) have subscription tickets to other performance types, in addition to choral music.

2.11.4 PRICING ISSUES

The price paid for a single ticket to a performance of choral music by audiences approximates the average price audiences overall paid ($21 for choral music audiences compared to $23 for audiences overall, see Table 1). Although two dollars lower, this difference is not great. Slightly higher than the national average for audiences overall, however mirroring the average for traditional performances, roughly seven-in-ten (71%) choral music audiences report paying less than $25 for a single ticket.

The data indicate that there is some price flexibility in terms of the amount choral music audiences are prepared to pay for a single ticket. While nearly three quarters indicate that they would be willing to pay an additional $2 (70%), only 46% indicate that they are prepared to pay $4 and more, nearly one quarter say they would be willing to pay at least $6 more. Of some concern, however, is the fact that a slightly higher proportion of choral music audiences compared with the national average of traditional audiences, or in fact, audiences overall, of just over one-in-five (21%), indicate that they would not attend if the price of ticket was any higher.

The fact that there is some price flexibility is reflected in the fact that the mean amount choral audiences say they are prepared to pay for a classical music performance is $25. This is well above the mean of $21 they reported paying for the performance at which they were surveyed. Note, however, that the question on willingness to pay was asked generically about classical music. The $25 mean, therefore, represents an average upper limit this audience is prepared to pay for performances they like within a "classical" genre (see Table 2).

Table 1

CHORAL MUSIC AUDIENCE: TICKET AND SUBSCRIPTION PRICE ISSUES

	CHORAL AUDIENCE %	TOTAL TRADITIONAL AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	9	9	10
$10 - $14	15	19	18
$15 - $19	23	25	21
$20 - $24	24	17	15
$25 - $29	12	9	9
$30 - $34	2	4	5
$35 - $39	2	2	3
$40 - $49	2	3	3
$50 - $74	1	2	4
$75 or more	0	1	2
Gift	4	4	4
No opinion	5	6	6
Mean amount	$21	$21	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	28	27	28
$4.00 higher	18	22	21
$6.00 higher	8	10	10
$10.00 higher	16	14	14
NOT ATTEND IF ANY HIGHER:	21	16	17
No opinion	10	11	10
AMOUNT PAID FOR YEAR'S SUBSCRIPTION *:			
Less than $50	10	13	15
$50 - $99	21	26	22
$100 - $199	31	30	30
$200 - $299	13	15	14
$300 - $399	11	7	6
$400 or more	14	7	6
No opinion	17	18	19
Mean amount	$192.14	$159.06	$151.08
NUMBER OF PERFORMANCES IN SUBSCRIPTION:			
3 performances	2	7	8
4 performances	9	16	17
5 performances	26	23	25
6 or more performances	63	52	50
No opinion	29	27	28
CONTINUE WITH SUBSCRIPTION IF PRICES INCREASED BY:			
5%	38	42	43
10%	27	26	26
15%	25	22	23
Would discontinue	10	9	9
No opinion	18	15	16

* Those questions with *no opinion* above 10% have been recalculated to exclude the *no opinions*.

As previously noted, just over one third (37%) of choral music audiences hold subscription tickets to choral music performances. The average paid for a subscription package, however, is notably higher than the average paid by audiences overall ($192 compared to $151). The reason for this higher average is based on the fact that nearly four-in-ten (38%) choral music audiences paid $200 or more for a year's subscription compared with an average of 29% among traditional performance type audiences, and 26% among audiences overall. However, choral music audiences appear to be receiving a greater number of performances included in their subscription series. In fact, well over half (63%) indicate that they receive at least six performances, a proportion well above that found among traditional audiences overall, or all audiences overall (52% and 50%, respectively). In further comparison to other traditional performance types, while nearly one quarter (23%) report receiving under five performances in their subscription series, only one-in-ten (11%) choral music audiences report this number.

Similar to other traditional performance subscribers, choral music audiences seem to display little resistance to an increase in subscription prices, as only 10% say they would discontinue their subscription. While 90% say they would accept an increase of 5%, just over half indicate that they would continue with their subscription if prices were increased by 10% (52%).

Table 2

CHORAL MUSIC AUDIENCE: AMOUNT PAID FOR PERFORMANCE ATTENDED AND AMOUNT PREPARED TO PAY FOR A CLASSICAL MUSIC PERFORMANCE

	GIFT	$10- OR LESS	$11- $15	$16- $19	$20- $24	$25- $29	$30- $39	$40- $49	$50-OR MORE	MEAN AMOUNT	NOTHING/ NOT INTERESTED	NO OPINION
	%	%	%	%	%	%	%	%	%	$	%	%
CHORAL AUDIENCE												
Amount paid *	-	9	15	23	24	12	4	2	1	$21	-	5
Amount prepared to pay	-	6	14	16	26	8	10	6	4	$25	4	6
GENERAL PUBLIC/ CHORAL** Attender												
Amount prepared to pay	-	21	28	13	15	11	4	2	2	$18	2	2

* The categories for the amount paid question are slightly different: Less than $10, $10 - $14, $15 - $19. Thereafter the categories are the same.

** Reported that they attended a choral music performance in the last six months.

2.11.5 DEMOGRAPHICS

Those who comprise choral music audiences are notably more likely to be women, especially among those who attend most frequently where over two thirds are reportedly women. In addition, choral music audiences are more likely to be older, with nearly half being 55 years of age or older, well educated, and upscale (those whose annual household income exceeds $60,000) (see Table 3).

Similar to the demographics of choral music audiences, attenders from the general public are more likely to be women and slightly more likely to be older. Further, over one third have completed university. There does not appear to be significant differences in terms of annual household income, at least according to the general public data.

With respect to life cycle, choral music audiences are more likely to be older couples with no children at home. Singles with no children also comprise a significant proportion of the choral music audience. In comparison, a significant proportion of attenders from the general public tend to be young couples with children. Younger singles with no children also represent a significant segment of these attenders.

Interestingly, while older married couples with no children constitute a significant proportion of the audience, as do older singles, however, to a lesser extent.

Table 3
CHORAL MUSIC AUDIENCE: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	CHO. MU. AUDIENCE TOTAL %	DID NOT ATTEND %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %	GENERAL PUBLIC TOTAL %	NEVER ATTENDED %	ATTENDED IN LAST 5 YEARS %	ATTENDED IN LAST 6 MONTHS %
GENDER								
Male	41	39	47	30	49	50	40	42
Female	59	61	53	68	51	49	60	58
AGE								
16 - 24 years	6	6	8	2	16	17	11	12
25 - 34 years	14	12	13	17	26	28	21	15
35 - 44 years	17	16	19	14	24	24	24	22
45 - 54 years	17	25	13	18	14	13	19	20
55 - 64 years	24	22	22	29	10	10	14	15
65 years or older	22	18	26	20	10	9	12	16
HOUSEHOLD INCOME								
Less than $10,000	7	11	6	5	7	7	6	4
$10,000 - $19,999	10	13	6	14	14	14	11	11
$20,000 - $29,999	3	4	1	4	18	18	17	16
$30,000 - $39,999	12	14	11	12	17	17	16	19
$40,000 - $49,999	16	19	14	16	18	18	18	17
$50,000 - $59,999	11	13	11	9	11	11	13	13
$60,000 - $74,999	14	4	17	20	8	8	7	9
$75,000 or more	27	24	33	19	8	8	12	10
EDUCATION: Highest level								
Less th. high sch.	3	3	3	3	20	20	10	10
High school diplo.	21	24	22	14	27	28	18	16
College	23	23	24	22	17	17	18	18
Some university	-	-	-	-	7	7	11	12
Bachelor's degree	26	24	24	34	12	11	20	20
Grad/Prof. degree	26	25	27	25	6	5	13	13
Student	-	-	-	-	11	12	10	11
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	20	20	18	23	24	25	19	18
Married, under 45, no child. at home	7	2	11	4	10	11	10	5
Married, under 45, child. present	7	8	9	4	29	30	24	24
Single parent	6	8	5	5	4	4	4	4
Married, 45 and +, child. present	12	14	11	11	9	8	13	14
Married, 45 and +, no child. at home	30	27	30	33	15	14	19	23
Single/45 and +, no child. at home	18	20	16	20	8	8	11	13

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.12 Pop/Rock

2.12.1 Attendance Patterns

Over four-in-ten (43%) Canadians report having ever attended a pop/rock performance, making pop/rock the second-most attended type of performance (second only to comedy at 47%). Furthermore, attendance is relatively frequent.

Over one quarter (27%) of the general public report having attended a pop/rock performance in the last six months. In contrast, among pop/rock audiences, reported attendance is quite infrequent relative to the other types of performances, with only 18% reporting that they attended three or four performances in the last full season and half (49%) reporting that they attended only one or two performances last season. (The "season" will be used for all Popular performing arts to be consistent with use of the term in the Traditional performing arts analysis).

That being said, there is significant interest among both pop/rock audiences and the general public in attending pop/rock performances more frequently. Among the general public, 37% indicate an interest in attending more frequently. As was the case with attendance, this is one of the strongest positive responses relative to the other performance categories examined (again, second only to comedy at 45%).

Among pop/rock audiences, 46% indicate an interest in attending this type of performance more frequently. Perhaps not surprisingly, in the audience sample it is those who attend infrequently (i.e., once or twice in the previous season) who are most likely to want to increase their attendance (26%), while those who had not attended any pop/rock performances in the last season and those who had attended three or four are significantly less likely to want attend more (10%).

In the general public sample, recent (last six months) and less frequent (last five years) attenders are equally likely (19% and 18% respectively) to report that they would like to attend more pop/rock performances.

Other audience types who report an interest in attending pop/rock performances include stand-up comedy and country music attenders, among whom 34% and 33%, respectively, say they would like to attend more pop/rock performances. However, pop/rock appears to have only limited appeal for the remaining audience groups.

With the exception of the two groups mentioned above and, to a lesser extent, audiences of children's performances (20%), in no other performance type does more than one-in-five show interest in attending more pop/rock performances.

In contrast, among the general public who have attended a performance of some type in the last six months, much higher levels of interest in pop/rock performances are evident. In particular, majorities of those who had attended stand-up comedy (56%) or jazz/blues performances (52%) expressed an interest in more frequent pop/rock attendance. Recent attenders of contemporary dance (47%), symphonic "pops" (46%), children's performances (46%) and avant-garde theatre (43%) are also very likely to be interested in attending more pop/rock performances.

2.12.2 EXPECTATIONS AND PERCEPTIONS

In order to better understand pop/rock's audience appeal, it is necessary to clarify what the audience's expectations are for this type of performance. A series of agree/disagree statements shown in Table 1 were designed to do this.

Questions regarding the performance venue do not appear to elicit very different responses from among the three groups examined - pop/rock audiences, Popular arts audiences and total audience. In general, a plurality in all of the audiences examined tend to agree that they would go to clubs more often if they were less smoky. Pop/rock audiences (51% agree) appear to be slightly more receptive to this argument than are audiences generally (43% agree).

All audience types tend to disagree with the statement that they want to be able to talk and socialize with their friends during the performance, with audiences generally being slightly more likely to disagree (50%) than pop/rock audiences (45%).

In line with the finding that pop/rock audiences are slightly more likely to want to talk to their friends during a performance than are audiences generally, it is not surprising to also find that pop/rock audiences are significantly more likely than audiences generally to agree that they would prefer to see performers in a club than in a concert hall. Among pop/rock audiences, 42% agree that they would prefer a club venue to a concert hall. In contrast, the plurality (36%) of audiences generally disagree, implying that they would prefer a concert hall venue to a club.

However, the preference for club venues among pop/rock attenders certainly cannot be fully explained by their wish to be able to socialize during the performance since only 17% of pop/rock attenders agree with that statement. It seems more likely that a preference for the smaller, more intimate atmosphere of clubs compared to concert halls must be having some effect.

Perceptions of the legitimacy of contemporary music do not vary greatly between audiences generally and pop/rock audiences specifically. Majorities among arts audiences generally, audiences of the popular arts and pop/rock audiences all believe that "singers and popular musicians are real artists" although pop/rock attenders are somewhat more likely to agree (77%) than are audiences generally (61%).

The largest discrepancy in perceptions between performing arts audiences generally and pop/rock audiences specifically is on the issue of whether or not they are personally affected by popular music. Not surprisingly, pop/rock audiences are much more likely to indicate that they are personally affected by popular music (52% "agree" and only 4% "disagree") than either audiences of the Popular arts (40% "agree" and 19% "disagree") or performing arts audiences generally (32% "agree" and 26% "disagree").

These findings indicate that it is probably not their feelings about the venue of contemporary music performances that differentiate pop/rock audiences from other arts audiences and perhaps discourage other performing arts audiences from attending pop/rock performances. Rather it appears that the key to attendance is the audiences' feelings towards that particular type of music.

Table 1
POP/ROCK: STATEMENTS ABOUT POPULAR MUSIC

	Agree strongly %	Agree somewhat %	Agree/ Disagree slightly %	Somewhat Disagree %	Strongly Disagree %	No opinion %
Singers and pop musicians are real artists						
Total audience	31	31	24	5	3	6
Popular audience	38	31	21	4	2	4
Pop/Rock audience	45	32	17	4	2	1
If clubs less smoky might go more often						
Total audience	27	16	24	10	16	6
Popular audience	31	18	24	9	14	4
Pop/Rock audience	30	21	25	10	12	1
Prefer to see performers in club than in concert hall						
Total audience	15	14	29	14	22	6
Popular audience	16	16	32	14	18	4
Pop/Rock audience	23	19	32	11	14	1
Like to socialize with friends during performance						
Total audience	5	9	29	16	34	6
Popular audience	7	11	34	18	28	4
Pop/Rock audience	7	10	37	20	25	1
You are personally affected by popular music						
Total audience	13	19	36	11	15	6
Popular audience	18	22	37	9	10	4
Pop/Rock audience	29	23	33	7	7	1

When asked to indicate what they expect from a pop/rock performance both the general public and pop/rock attenders prefer escapism to realism. Their expectations range from *allowing you to forget your problems* to *making you feel good,* and from *being entertained* to *having a strong emotional impact*. It should be noted, however, that the general public are significantly less likely to expect the performance to have a strong emotional impact and instead are more likely to expect a performance to be entertaining (which was not asked of audiences). Clearly, however, both groups expect to leave a pop/rock performance feeling good rather than having gained insight into themselves, social issues or "real" life.

2.12.3 Ticket Purchasing

As is the case with the other audiences examined, the majority of pop/rock audiences do their ticket purchasing in person (52%) rather than by telephone (34%). Pop/rock audiences are also more likely to conduct their purchases with the venue's box office (59%) than with a ticket agency (27%).

Table 2

POP/ROCK AUDIENCE: TICKET PRICE ISSUES

	Pop/Rock AUDIENCE %	POPULAR AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	6	7	10
$10 - $14	15	14	18
$15 - $19	20	18	21
$20 - $24	12	15	15
$25 - $29	24	11	9
$30 - $34	8	8	5
$35 - $39	4	4	3
$40 - $49	1	4	3
$50 - $74	3	8	4
$75 or more	1	3	2
Gift	2	3	4
No opinion	4	5	6
Mean amount	$24	$28	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	28	28	28
$4.00 higher	22	20	21
$6.00 higher	10	9	10
$10.00 higher	15	15	14
NOT ATTEND IF ANY HIGHER:	19	19	17
No opinion	5	9	10
Mean amount	$24	$28	$23

2.12.4 Pricing Issues

Relative to the average for all types of performances pop/rock audiences paid slightly more for their tickets. As Table 2 reveals, the mean amount paid for a pop/rock ticket is $24 compared to $28 for popular performances generally and $23 for all audiences surveyed. The majority (56%) of pop/rock attenders paid between $15 and $30 for their tickets.

Pop/rock attenders are no more nor less likely than other audience types to be willing to pay more for their tickets. While only one-in-four (25%) pop/rock attenders are willing to pay an extra $6 or more for their pop/rock tickets, there appears to be significant price flexibility at the $2 to $4 level. Three quarters of pop/rock attenders state that they are prepared to pay $2 more for their tickets, while 47% say they are prepared to pay $4. In all, 19% of pop/rock attenders state that they are unwilling to pay any more for their tickets.

However, when asked to indicate the full dollar amount that they are willing to pay for a ticket to a pop/rock performance, pop/rock attenders cite an average figure that is two dollars less ($22) than the average amount that they paid for their last such ticket ($24). In contrast to the previous findings then, this finding clearly indicates that there is a significant measure of price resistance for pop/rock ticket prices.

There is a relationship between frequency of pop/rock attendance and ticket price. Among the general public the amount that an individual is willing to pay for a ticket to a pop/rock performance increases from $16, among those who have never attended such a performance, to $24 among those who state that they have not only attended a performance in the last six months but also want to attend more frequently.

Similarly, in the pop/rock audience sample, the amount that a pop/rock attender is willing to pay for a ticket to a performance increases from $18 for those who did not attend such a performance in the previous season to $22 for those who attended three or more performances in the last full season to $23 for those who state that they want to attend pop/rock performances more frequently.

In combination, these findings imply both that high prices may be the primary deterrent for those who are not attending pop/rock performances and that frequent pop/rock attenders are committed enough to this type of performance that they are prepared to pay ticket prices that are in line with those for other performance types.

Table 3

POP/ROCK: AMOUNT PAID FOR PERFORMANCE ATTENDED AND AMOUNT PREPARED TO PAY FOR A POP/ROCK PERFORMANCE

	GIFT	$10- OR LESS	$11- $15	$16- $19	$20- $24	$25- $29	$30- $39	$40- $49	$50-OR MORE	MEAN AMOUNT	NOTHING/ NOT INTERESTED	NO OPINION
	%	%	%	%	%	%	%	%	%	$	%	%
POP/ROCK AUDIENCE												
Amount paid *	2	6	15	20	12	24	12	1	4	$24	-	4
Amount prepared to pay	-	10	14	14	29	10	7	2	1	$22	8	4
GENERAL PUBLIC**/Pop/ Rock Attender												
Amount prepared to pay	-	9	14	14	24	18	12	3	3	$24	2	1

* The categories for the amount paid question are slightly different: Less than $10, $10 - $14, $15 - $19. Thereafter the categories are the same.

** Reported that they attended a pop/rock performance in the last six months.

2.12.5 DEMOGRAPHICS

As would be expected, the core pop/rock audience is made up of the young, singles and students. The majority of those in the audience reporting the most frequent attendance (i.e. 3 or 4 times in the previous season) are under 35 years (70%), have a high school or a college education (62%) and have an annual household income under $50,000 (55%).

Similarly, among the general public, those who report having attended a pop/rock performance in the last six months are disproportionately aged 16 to 34 years (69% versus 42% of the total general public), students (22% versus 12% of the total general public) and in the young singles without children life cycle category (47% versus 24% of the total general public).

Table 4

POP/ROCK MUSIC: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	POP/ROCKA UDIENCE TOTAL %	DID NOT ATTEND %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %	GENERAL PUBLIC TOTAL %	NEVER ATTENDED %	ATTENDED IN LAST 5 YEARS %	ATTENDED IN LAST 6 MONTHS %
GENDER								
Male	40	32	42	52	46	47	51	53
Female	60	68	58	48	52	53	49	47
AGE								
16 - 24 years	20	9	25	28	16	6	20	33
25 - 34 years	35	28	38	42	26	17	42	36
35 - 44 years	27	30	26	24	24	24	25	23
45 - 54 years	9	12	9	6	14	19	8	7
55 - 64 years	5	12	1	0	10	17	3	1
65 years or older	4	10	1	0	10	17	2	0
HOUSEHOLD INCOME								
Less than $10,000	13	9	16	13	7	7	6	6
$10,000 - $19,999	9	16	6	7	14	16	9	11
$20,000 - $29,999	2	1	2	7	18	18	19	18
$30,000 - $39,999	16	21	14	15	17	16	17	18
$40,000 - $49,999	15	10	18	13	17	18	16	17
$50,000 - $59,999	11	12	11	7	11	11	12	11
$60,000 - $74,999	19	19	18	24	8	7	10	9
$75,000 or more	14	12	15	15	8	7	10	10
EDUCATION: Highest level								
Less th. high sch.	3	2	4	0	18	24	12	10
High school diplo.	31	29	33	32	27	28	27	24
College	28	31	26	30	17	16	21	17
Some university	-	-	-	-	8	8	6	8
Bachelor's degree	25	24	26	24	13	12	15	14
Grad/Prof. degree	12	13	11	14	6	7	6	5
Student	-	-	-	-	12	6	13	22
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	38	28	44	42	24	11	30	47
Married, under 45, no child. at home	19	11	19	32	10	6	17	16
Married, under 45, child. present	20	21	20	18	29	28	38	25
Single parent	6	7	7	2	4	5	3	4
Married, 45 and +, child. present	4	6	4	2	9	13	5	3
Married, 45 and +, no child. at home	6	13	3	0	15	24	5	3
Single, 45 and +, no child. at home	7	14	3	4	8	13	2	2

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.13 Stand-Up Comedy

2.13.1 Attendance Patterns

Over one third (34%) of the general population of Canada recalls having attended a stand-up comedy performance at least once in the past five years. This represents one of the most frequently attended performance types. Among those who constitute the current audience, relative to other performance types, a clear majority (63%) of stand-up comedy audiences report only attending one or two performances during the last complete season. In fact, fewer than one-in-five (15%) say they attended three or four times. Thus, while there is a broad-based audience, it is not an especially regular audience.

Having said this, however, interest in attending stand-up comedy performances more frequently is high throughout the general public, and even more so among current audiences. Among the general public, over one third of Canadians express an interest in attending more frequently. Interest is somewhat higher among less frequent attenders, that is, those who attended a performance in the last five years or never (20%), versus more frequent attenders who recall having attended a performance in the last six months (14%). Among stand-up comedy audiences, nearly half express an interest in attending performances of this type more frequently. Interest is highest among those who attended once or twice in the last season (29%), and by a significant margin. In fact, less than one-in-ten (7%) frequent attenders, that is those who attended at least three times in the last season, or non-attenders (9%), that is those who did not attend in the last complete season, express an interest in attending more frequently.

In seeking to broaden the audience base, the obvious place to look is among audiences for other performing arts products. Just as stand-up comedy audiences attend a variety of other performance types, so too do other audience types attend stand-up comedy performances. Most notably, audiences of comedy (63%), choral music (40%), pop/rock (40%), musicals (39%) and drama (37%) are more likely than other performance types to report having attended stand-up comedy performances in the last season. Those audiences indicating an interest in attending stand-up comedy more frequently include comedy (44%) and pop/rock (34%)

Similarly, among the general public, attenders of a variety of other performance types express an interest in attending stand-up comedy more frequently. These include children's theatre (78%), comedy (60%), pop/rock (56%) and drama (44%).

2.13.2 Expectations and Perceptions

Audiences of stand-up comedy expect performances to allow you to forget your problems (71%), and make you feel good (66%). Among the general public, that the performance be entertaining (50%), that it allows you to forget your problems (48%) and that it make you feel good (42%) receive highest mention in terms of expectations from a performance (that a performance be entertaining was not offered as a response for audience members surveyed).

Table 1

STAND-UP COMEDY AUDIENCE: TICKET PRICE ISSUES

	STAND-UP COMEDY AUDIENCE %	TOTAL POPULAR AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	6	7	10
$10 - $14	18	14	18
$15 - $19	6	18	21
$20 - $24	23	15	15
$25 - $29	13	11	9
$30 - $34	4	8	5
$35 - $39	10	4	3
$40 - $49	2	4	3
$50 - $74	2	8	4
$75 or more	2	3	2
Gift	2	3	4
No opinion	4	5	6
Mean amount	$24	$28	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	30	28	28
$4.00 higher	24	20	21
$6.00 higher	9	9	10
$10.00 higher	12	15	14
NOT ATTEND IF ANY HIGHER	17	19	17
NO OPINION	8	9	10

2.13.3 TICKET PURCHASING

The average amount stand-up comedy audiences paid for a single ticket to a performance approximates the average across all performances ($24 for stand-up comedy compared with $23 for audiences overall). Similar to other Popular performing arts, over half (53%) of stand-up comedy audiences paid under $25 for a single ticket. Further, while just over one quarter (29%) report paying between $25 to $50, very few (4%) paid $50 or more.

In terms of price flexibility, a large majority of stand-up comedy audiences would be willing to pay an additional $2 (75%), while 45% are prepared to pay $4 more to attend a performance. Consistent with the proportion of Popular performing arts audiences overall, 17% say they would not attend if the price were any higher.

Ticket purchasing habits of stand-up comedy audiences differ only somewhat from other audiences. Stand-up comedy audiences are most likely to purchase their tickets in person at the box office (42%). Similar to audiences overall, approximately one quarter (21%) purchase their ticket by telephoning the box office, while a slightly higher proportion, compared with audiences overall, purchase a ticket in person through a ticket agency (24% of stand-up comedy audiences compared to 21% of audiences overall).

2.13.4 DEMOGRAPHICS

Demographics of stand-up comedy audiences indicates that women are slightly more likely to be represented than men among the audience (44% versus 45%). Among the public the proportion is fairly equal (52% female).

Further, among stand-up comedy audiences over half (60%) report being under 35 years of age -- very few are 55 years or older (8%). Similarly among the general public, the majority of Canadians who attended a stand-up comedy performance in the last six months are under 35 years (64%). In terms of educational attainment, recent attenders among the general public are somewhat above average in education, however this does not appear to be the case among audiences.

As far as household income is concerned, the general public recent attenders are little different from the public overall, while the audience at a stand-up comedy performance appear to be well above average in income.

Consistent with previously noted variations in the age distribution of stand-up comedy performances, the audience tends to be comprised of young singles with no children. Nearly half (46%) of those most frequent attenders fall into this category.

Those who are attending performances from the general public similarly tend to be young singles with no children (41%). Roughly one quarter (23%) of attenders of the past six months, however, were young married couples with children.

Table 2

STAND-UP COMEDY: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	STAND-UP COMEDY AUDIENCE %	DID NOT ATTEND %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %	GENERAL PUBLIC TOTAL %	NEVER ATTENDED %	ATTENDED IN LAST 5 YEARS %	ATTENDED IN LAST 6 MONTHS %
GENDER								
Male	44	43	45	41	46	50	46	46
Female	55	57	55	58	52	50	54	53
AGE								
16 - 24 years	27	21	29	29	16	12	18	29
25 - 34 years	33	40	31	31	26	22	37	35
35 - 44 years	22	16	26	17	24	24	26	19
45 - 54 years	9	13	8	10	14	16	10	9
55 - 64 years	4	6	4	0	10	13	5	5
65 years or older	4	4	2	12	10	13	4	3
HOUSEHOLD INCOME								
Less than $10,000	10	12	9	12	7	7	4	6
$10,000 - $19,999	12	11	12	19	14	15	12	11
$20,000 - $29,999	1	0	1	0	18	18	16	19
$30,000 - $39,999	16	15	17	14	17	17	16	15
$40,000 - $49,999	12	14	12	9	11	17	16	19
$50,000 - $59,999	10	8	9	16	8	10	14	12
$60,000 - $74,999	12	11	13	9	8	8	8	8
$75,000 or more	26	29	27	21	7	7	13	10
EDUCATION: Highest level								
Less th. high sch.	3	3	3	2	18	21	7	6
High school diplo.	35	24	36	46	27	30	13	15
College	25	24	25	27	17	17	17	15
Some university	-	-	-	-	8	7	9	11
Bachelor's degree	28	40	26	17	13	10	22	24
Grad/Prof. degree	10	10	10	8	6	3	12	12
Student	-	-	-	-	12	10	17	15
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	41	38	41	46	24	18	30	41
Married, under 45, no child. at home	14	15	14	9	10	8	14	16
Married, under 45, child. present	22	19	24	17	29	30	34	23
Single parent	6	4	7	4	4	4	4	4
Married, 45 and +, child. present	7	6	8	2	9	11	6	5
Married, 45 and +, no child. at home	7	12	3	17	15	18	8	8
Single, 45 and +, no child. at home	3	6	2	4	8	10	5	3

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.14 Folk

2.14.1 Attendance Patterns

Overall, while 16% of Canadians report having ever attended a folk music performance, based on the responses of audiences, those who constitute the current audience attend on a fairly regular basis. For example, only 18% among the folk audiences surveyed say they did not attend a performance in the last complete season. Relative to other performance types, however, folk audiences report attending fewer times throughout the season. Almost half (49%) report attending only one or two performances during the last season.

There appears to be limited desire to attend these performances more often among both folk music audiences and the general public. The groups expressing the most interest to attend performances more frequently are audience members who have attended folk music performances only once or twice in the last season (18%). In the general public, 10% consider themselves devoted to folk performances.

In exploring strategies to broaden the audience base, the obvious place to look is among audiences of other types of performances. Just as folk music audiences appear to attend a wide variety of other performance types (drama 20%, comedy 30%, country music 41%, musicals 20% and stand-up comedy 31%), other audiences also attend folk music performances. In fact, one third (33%) of jazz/blues audiences and one-fifth (19%) of ethnic /heritage audiences express an interest in attending folk performances more often.

Among the public who have attended a performance in the last six months, the results are fairly consistent with the audience data. Recent attenders of contemporary dance (22%), drama (22%), avant-garde theatre (28%), chamber/soloists (23%), choral (24%), jazz/blues (21%), country (22%), musicals (21%), children's performances (22%) and ethnic/heritage performances (26%) are the most likely to express an interest in more frequent attendance at folk performances.

The level of potential interest among the general public in attending folk music performances is fairly low, with 77% of the population reporting that they have never seen a folk music performance and have little or no interest in doing so. The remaining 23% who have attended a folk music performance is not insignificant. However, when asked how much they enjoyed different types of performances, only 15% of the general public say they like folk performances a great deal. This suggests that the probable limit for a folk audience is less than one-in-five of the general public.

2.14.2 Expectations and Perceptions

Broad expectations of audiences of folk performances include that it allows them to forget their problems, makes them feel good, and has a strong emotional impact. The general public's expectations are only slightly different, namely that a performance be entertaining (this was not asked of audiences). In addition, the public are less concerned with the emotional impact of a performance. It is also evident that audiences and the general

public who attend folk music performances are not seeking important insights into the human condition, social statements, or performances that bring about self-reflection.

2.14.3 Ticket Purchasing

In their ticket purchasing habits, folk music audiences generally reflect the behaviour of other audiences. They tend however, to be more likely than other audiences to purchase tickets in person from the box office (48%). Like other audiences they would like to do more purchasing by telephone.

2.14.4 Pricing Issues

Relative to other types of performances, folk audiences paid on average somewhat less for their tickets. As Table 1 indicates, the mean amount paid for tickets to folk performances is $19 compared to $28 for the total Popular performing arts audience and $23 for the combined Popular and Traditional audiences.

Possibly because they are used to paying lower prices, folk audiences are less willing to pay more for a single ticket to a performance than are Popular audiences overall. Almost one-fifth (17%) of folk audiences say that they are not willing to attend performances if the price would be higher. However, 73% say they are willing to pay $2 more, while 41% would pay $4 more. This suggests that there is some flexibility on the issue of price of the tickets on the part of folk audiences, at least in the $2 to $4 range. However, this willingness to pay more must be questioned, in light of the fact that audiences indicate that they are prepared to pay a lower amount for a single ticket to a folk performance than they report paying for the performance at which they were surveyed.

As Table 2 indicates, while folk audiences report paying on average $19 for a single ticket, the average they say they are prepared to pay is only $16. Thus, while 28% of folk audiences say they paid $15 or less, a much higher percent (41%) say they are prepared to pay this amount. It may well be that audiences may feel they are already paying too much and would prefer lower prices for tickets to folk performances. These results also indicate however, that although the audiences say otherwise, they are in behaviour more flexible on the issue of the price of tickets than their attitudes indicate. As a point of comparison, recent folk attenders among the general public are less willing to pay higher prices for tickets. The average amount the public say they are prepared to pay is $14. Further, 57% say that they would not pay more than $15 for a single ticket.

Folk audiences, even those who have attended most frequently and those who express an interest in attending more frequently, express an unwillingness to pay more. Little variation in terms of *price willing to pay* for a single ticket to a folk performance is evident regardless of frequency of attendance and interest in attending more often in both the audience and general public.

Table 1
FOLK AUDIENCE:
TICKET PRICE ISSUES

	FOLK AUDIENCE %	TOTAL POPULAR AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	11	7	10
$10 - $14	17	14	18
$15 - $19	41	18	21
$20 - $24	9	15	15
$25 - $29	4	11	9
$30 - $34	2	8	5
$35 - $39	2	4	3
$40 - $49	1	4	3
$50 - $74	0	8	4
$75 or more	0	3	2
Gift	6	3	4
No opinion	7	5	6
Mean amount paid	$19	$28	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	32	28	28
$4.00 higher	18	20	21
$6.00 higher	10	9	10
$10.00 higher	13	15	14
NOT ATTEND IF ANY HIGHER:	17	19	17
No opinion	10	9	10

Table 2
FOLK AUDIENCE: AMOUNT PAID FOR PERFORMANCE ATTENDED AND AMOUNT PREPARED TO PAY FOR A FOLK PERFORMANCE

	GIFT %	$10- OR LESS %	$11- $15 %	$16- $19 %	$20- $24 %	$25- $29 %	$30- $39 %	$40- $49 %	$50-OR MORE %	MEAN AMOUNT %	NOTHING/ NOT INTERESTED %	NO OPINION %
FOLK AUDIENCE												
Amount paid *	5	11	17	41	9	4	4	1	1	$19	-	7
Amount prepared to pay	-	17	24	17	13	3	1	1	0	$16	12	11
GENERAL PUBLIC/Folk Attender**												
Amount prepared to pay	-	37	20	12	14	4	2	2	1	$14	6	2

* The categories for the amount paid question are slightly different: Less than $10, $10 - $14, $15 - $19. Thereafter the categories are the same.

** Reported that they attended a folk music performance in the last six months.

2.14.5 DEMOGRAPHICS

The demographic characteristics of folk audiences indicate that women attend folk performances more so than men. In all, Table 3 shows that men make up 34% and women 66% of folk audiences. This trend in attendance also holds true for the audiences reporting frequent attendance at folk performances. In the general public however, of those reporting attendance in the last five years, men and women attended in almost equal numbers (47% and 53% respectively).

In terms of age, folk audiences appear to reflect the average age of the population overall. Among the public who have attended a folk performance in the last six months, 66% are below the age of 45 years and 44% are 45 years of age and older.

Income and education data suggest that audiences are little different from audiences for other performances or more frequent attenders. Namely, folk audiences and recent attenders have higher household incomes and better educations than others in the population. Among the general public, however, of those who have attended in the last five years, overall income and educational levels seem to be little different from the population overall.

When life cycle variations are considered, the age relationships noted earlier become much clearer. Among the general public, young singles with no children and young couples with children are much more likely than other life cycle stages to be recent attenders or to have been to a folk performance in the last five years.

The stages of the life cycle have similar relationships with audiences of folk performances. Young singles with no children and young couples with children are most likely to have attended folk performances overall (15% and 18% respectively) and at different levels of frequency. A pattern which does not exist in the general public is found in the audience, namely that 22% of older couples with no children in the home ("empty nesters") have attended at least one folk performance in the last complete season.

Table 3
FOLK MUSIC: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	FOLK AUDIENCE TOTAL %	DID NOT ATTEND %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %	GENERAL PUBLIC TOTAL %	NEVER ATTENDED %	ATTENDED IN LAST 5 YEARS %	ATTENDED IN LAST 6 MONTHS %
GENDER								
Male	34	35	34	31	46	49	47	49
Female	66	62	66	69	52	51	53	51
AGE								
16 - 24 years	5	10	0	0	16	17	10	14
25 - 34 years	20	18	21	25	26	26	27	25
35 - 44 years	24	19	27	31	24	23	26	26
45 - 54 years	23	20	25	27	14	13	17	16
55 - 64 years	18	19	21	11	10	11	11	11
65 years or older	10	14	6	6	10	10	9	8
HOUSEHOLD INCOME								
Less than $10,000	5	7	1	7	7	7	5	4
$10,000 - $19,999	16	15	16	16	14	14	11	13
$20,000 - $29,999	0	1	0	0	18	18	18	19
$30,000 - $39,999	11	12	12	9	17	17	18	17
$40,000 - $49,999	13	12	14	14	17	17	18	19
$50,000 - $59,999	14	13	13	19	11	11	12	11
$60,000 - $74,999	24	26	23	21	8	8	8	9
$75,000 or more	17	14	21	14	8	8	10	8
EDUCATION: Highest level								
Less th. high sch.	5	7	3	2	18	20	13	11
High school diplo.	31	33	26	17	27	28	19	22
College	21	21	24	15	17	17	17	14
Some university	-	-	-	-	8	7	10	11
Bachelor's degree	28	28	23	42	13	11	21	18
Grad/Prof. degree	13	10	13	20	6	6	10	8
Student	-	-	-	-	12	11	10	16
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	15	17	12	17	24	23	26	29
Married, under 45, no child. at home	13	12	13	15	10	11	8	10
Married, under 45, children present	18	17	21	20	29	30	27	23
Single parent	5	5	4	4	4	4	4	5
Married, 45 and +, children present	14	13	14	13	9	9	10	11
Married, 45 and +, no child. at home	22	26	22	13	15	15	17	14
Single, 45 and +, no child. at home	13	10	14	18	8	8	8	8

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.15 Musicals

2.15.1 Attendance Patterns

Although 65% of Canadians report that they have never attended a musical performance, 19% indicate that they have attended a performance in the last six months and 15% have attended at least one musical in the last five years.

Compared to attendance patterns for other Popular arts performances, these figures are comparable with those reported for stand-up comedy and are higher than those reported for jazz, folk and country. Pop/rock is the only type of Popular arts performance reporting higher attendance among the general public.

Relative to other performance types, in both the Popular and Traditional performance categories, audiences for musicals are much less likely to attend several performances throughout the season (only 14% attended three or four times last season). While 29% did not attend at all last season, there is a strong tendency for audiences of musicals to attend one or two performances in a season (57%). These findings can be largely attributed to two factors in particular. First, musicals characteristically have extended runs and there is limited availability of the product. Second, the price of a ticket for a musical is significantly more expensive than for most other arts performances.

Despite a small audience base and a tendency to attend musicals less frequently than other performances, there is an interest among both audiences for musicals and the general public to attend more frequently. Almost 30% of audiences who attended one or two times last season report that they would like to attend more often. With 31% of the general public and 46% of audiences for musicals indicating a desire for increased attendance, an opportunity to expand this audience base definitely does exist.

In addition to increasing the frequency of attendance among current audiences, opportunities to expand the audience base for musicals also exist among the audiences of other arts performances. Examining the other groups surveyed, a significant number of respondents for each performance category report that they attended a musical in the last season. In particular, ballet (45%), drama (47%), comedy (45%), symphonic music (45%), symphonic "pops" (48%), contemporary classical (45%), opera (52%), choral (49%), jazz (45%) and folk (45%) audiences all indicated that they attended a musical during the last complete season. More importantly, a large number of respondents in these other groups indicate that they would like to attend musicals more frequently.

Findings among the general public in this area are also encouraging. Consistent with the audience data, there is a keen interest among those who have attended a performance in the last six months to see more musicals.

2.15.2 Expectations and Perceptions

The expectations of audiences for muscials are very similar to the expectations cited among other audiences. Overall, they seek performances that allow them to forget their problems for a while (69%), make them feel good (67%) and which have a strong emotional impact (49%).

The number one expectation among the general public is that the performance be entertaining (49%); this item was not asked of audiences. Significantly less concerned about emotional impact, the public also expect a performance to allow them to forget their problems (44%) and to make them feel good (44%).

Distinguishing the general public from the musicals' audience, 38% expect a performance to be about real people facing real life situations.

2.15.3 Ticket Purchasing

The majority of musicals' audiences report purchasing tickets through the box office (59%), either by telephone or in person. In general, their ticket purchasing habits differ only slightly from those of other performance types. With the exception of theatre performances, they report a stronger likelihood of purchasing by telephone at the box office (33%); their second choice is to purchase in person at the box office (26%); and they have a tendency, unlike others, to purchase by telephone through an agency (15%).

2.15.4 Pricing Issues

Relative to other types of performances, including Popular performances, musicals' audiences paid significantly more for their tickets. The average amount paid for one ticket to a musical is $39, compared to $28 and $23 respectively, for Popular and all audiences surveyed. The difference between Popular and Traditional performance prices ($28 versus $21) can be largely attributed to the much higher prices being paid for musical and country performances, both of which fall in the popular performance category.

The higher mean for musicals is a result of two factors: first, only 17% of musicals' audiences paid less than $15 for their ticket and second, 43% paid more than $40 for their ticket.

Although 20% of musical audiences report that they are not willing to pay more for their ticket, 42% are prepared to pay up to $4 more to attend a musical and, 69% are prepared to pay $2 more for a single ticket.

2.15.5 Demographics

Demographic variations for musical performances last season indicate that over two-thirds (64%) of those musicals' audiences surveyed were female. This gender variation remains constant, regardless of the frequency of attendance. However, this gap closes slightly among the general public, only 58% of those attending in the last five years and 57% of those in the last six months are female.

Table 1

MUSICAL AUDIENCE: TICKET PRICE ISSUES

	MUSICAL AUDIENCE %	TOTAL POPULAR AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	6	7	10
$10 - $14	10	14	18
$15 - $19	6	18	21
$20 - $24	13	15	15
$25 - $29	6	11	9
$30 - $34	5	8	5
$35 - $39	4	4	3
$40 - $49	10	4	3
$50 - $74	25	8	4
$75 or more	8	3	2
Gift	3	3	4
No opinion	4	5	6
Mean amount	$39	$28	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	25	28	28
$4.00 higher	17	20	21
$6.00 higher	9	9	10
$10.00 higher	18	15	14
NOT ATTEND IF ANY HIGHER:	20	19	17
No opinion	10	9	10

In terms of age, musicals' audiences tend to be relatively consistent with the total population overall. Among audiences, those who attend performances with greater frequency tend to be younger, with 38% of those who attended three of four times last season between the ages of 16 and 34.

Income and education appear not to be significant determinants of attendance at musicals. While there is some tendency for both the general public and audience to have above-average income and education, the variations are not great. Examining life cycle variations, young singles with no children and young couples with children are more likely than other groups to have attended a musical in at least the last five years (50% and 51% respectively). There is also a tendency, although not as strong, for older couples with no children at home to attend musicals (35%). Not surprisingly, young singles with children and older singles with no children are less likely to be recent attenders.

These figures are generally consistent with the audience life cycle data. Although one is less likely to find young married couples with children in the audience (contrary to general public findings), recent attenders are generally comprised of young singles with no children and older couples with no children.

Table 2
MUSICALS: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	MUSICALS AUDIENCE TOTAL %	DID NOT ATTEND %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %	GENERAL PUBLIC TOTAL %	NEVER ATTENDED %	ATTENDED IN LAST 5 YEARS %	ATTENDED IN LAST 6 MONTHS %
GENDER								
Male	36	36	35	36	46	52	42	43
Female	64	64	64	62	52	48	58	57
AGE								
16 - 24 years	17	10	18	25	16	15	15	18
25 - 34 years	17	15	18	18	26	29	23	21
35 - 44 years	21	22	22	13	24	24	27	21
45 - 54 years	16	17	16	15	14	13	15	15
55 - 64 years	14	15	14	13	10	9	11	13
65 years or older	15	21	12	16	10	10	8	12
HOUSEHOLD INCOME								
Less than $10,000	9	10	6	19	7	8	5	5
$10,000 - $19,999	9	16	7	4	14	15	11	10
$20,000 - $29,999	4	2	4	4	18	20	16	14
$30,000 - $39,999	12	11	12	13	17	17	18	15
$40,000 - $49,999	17	15	19	13	17	18	16	19
$50,000 - $59,999	12	10	14	6	11	10	15	11
$60,000 - $74,999	16	16	17	13	8	7	8	11
$75,000 or more	22	22	21	28	8	6	12	14
EDUCATION: Highest level								
Less th high sch.	6	10	4	3	18	22	11	10
High school diplo.	35	31	33	48	27	30	22	21
College	26	27	28	20	17	18	18	15
Some university	-	-	-	-	8	7	9	10
Bachelor's degree	19	19	17	23	13	10	19	17
Grad/Prof. degree	14	13	17	7	6	4	8	11
Student	-	-	-	-	12	10	13	16
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	27	20	29	32	24	23	23	27
Married, under 45, no child. at home	8	12	7	4	10	11	11	8
Married, under 45, child. present	16	15	18	12	29	31	29	22
Single parent	7	6	5	14	4	4	4	5
Married, 45 and +, children present	11	12	11	9	9	9	10	9
Married, 45 and +, no child. at home	23	22	24	21	15	13	15	20
Single, 45 and +, no child. at home	8	12	6	7	8	8	9	9

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.16 Jazz/Blues

2.16.1 ATTENDANCE PATTERNS

Most Canadians (79%) have never attended a jazz/blues performance, however this may have much to do with a lack of availability outside the major centres. Of those who have, 13% report attending in the last six months and this would appear to constitute the approximate size of the core audience. Notably, the actual proportion of the population with an interest in jazz/blues is, somewhat larger, as 21% among the general public say they enjoy jazz/blues a great deal. At the same time, 32% of the public have either never been to a jazz/blues performance or have no interest in attending. These figures suggest that the potential audience for jazz/blues is well above the 13% of the public who report that they are recent attenders.

In building a larger audience for jazz/blues, this new audience is likely to be found more among Traditional performing arts audiences than among those who are part of the popular audience. The reason for this is that the jazz/blues audiences appear to be very eclectic in their taste; significant proportions (in excess of one third) indicate that in the last six months they have attended drama, comedy, symphonic music, chamber/soloist and choral performances. At the same time, a quarter or more of those attending contemporary dance, experimental theatre, symphonic music and contemporary classical music say they attended a jazz/blues performance during the last complete season. Moreover, interest in attending jazz/blues performances is well above average among the avant-garde audience for theatre, dance and music.

Among the general public, interest in attending more jazz/blues performances is highest among those reporting attending contemporary dance (39%), drama (33%) avant-garde theatre (39%), symphonic music (32%), symphonic "pops" (36%) and chamber/soloists (34%) in the last six months. Among Popular performance types, pop/rock (38%) and folk (39%) audiences express the highest proportion of interest.

2.16.2 EXPECTATIONS AND PERCEPTIONS

Audiences typically hold certain attitudes which influence their willingness to attend any type of performance. To assess how these attitudes might relate to jazz/blues, audiences were asked to agree or disagree with a series of statements about Popular music performances.

The only statement with which a majority of jazz/blues audiences agree is that singers and popular musicians are real artists (66%) and in this regard they are similar to other Popular performance type audiences. Responses to other statements suggest that the traditional image of the smoky, loud and crowded jazz/blues club is losing some of its appeal and cachet, even among jazz/blues audiences. A plurality of jazz/blue audiences agree that they might attend more performances in clubs if the clubs were less smoky (45%); only 28% disagree with this position. Further, there appears to be some interest in seeing performers in a concert hall rather than in a club (38%) although equal numbers indicate they prefer clubs. In addition, a majority (51%) disagree that they like to talk and socialize during the performance. Clearly, many jazz/blues audiences are looking for cleaner, quieter venues, although many would prefer not to have to go to concert hall for this experience.

Table 1

JAZZ BLUES: STATEMENTS ABOUT JAZZ BLUES

	Agree strongly	Agree somewhat	Agree/ Disagree slightly	Somewhat Disagree	Strongly Disagree	No opinion
	%	%	%	%	%	%
Singers and popular musicians are real artists						
Total audience	31	31	24	5	3	6
Popular audience	38	31	21	4	2	4
Jazz/Blues audience	37	29	20	6	3	5
If club were less smoky filled you might attend performances in clubs more often						
Total audience	27	16	24	10	16	6
Popular audience	31	18	24	9	14	4
Jazz/Blues audience	28	17	23	9	19	5
You prefer to see performers in a club than in a concert hall						
Total audience	15	14	29	14	22	6
Popular audience	16	16	32	14	18	4
Jazz/Blues audience	13	17	28	14	24	4
You like to talk and socialize with friends while watching the performance						
Total audience	5	9	29	16	34	6
Popular audience	7	11	34	16	28	4
Jazz/Blues audience	6	10	30	18	31	4
You are personally affected by popular music						
Total audience	13	19	36	11	15	6
Popular audience	18	22	37	9	10	4
Jazz/Blues audience	14	21	35	10	15	5

Jazz/blues audiences attend performances because they allow them to forget their problems and make them feel good, but the performances also seem to offer something that other types of Popular performances do not offer to their audiences. Jazz/blues audiences are more likely to say that their expectation is that the performance will have a strong emotional impact and that it will provide insight into who they are. This suggests that this audience expects to find something very moving and thought provoking about a performance.

The public's expectations are simpler. They expect that the performance will be entertaining (not asked of audiences), and that it will transport them from their problems and make them feel good.

2.16.3 TICKET PURCHASING ISSUES

Jazz/blues audiences report ticket purchasing behaviour which is not substantially different from the other audience types. Most (61%) purchases are made at the box office, largely in person (39%) but also by telephone (22%). As with the other groups, less reliance is placed on ticket agencies.

2.16.4 PRICING ISSUES

Jazz/blues audiences appear to have paid less for their tickets than audiences for other Popular types of performances, and audiences overall. Table 2 shows that the average price paid for a jazz/blues performance is $21, while the average "popular" and overall prices were $28 and $23, respectively. The key factor behind this lower mean price is that only 5% of jazz/blues audiences paid more than $30, while 27% of the popular audience and 21% of the total audience did so.

The data suggest, moreover, that there is some limited price flexibility. One third (33%) of jazz/blues audiences indicate that they would still attend if the ticket price were $2-$4 higher, while just under one-in-five (18%) indicate that they would be willing to pay at least $6 more. This latter response rate is slightly greater than that of audiences overall, although not as high as for audiences of Popular performance types. However, a similar proportion of 21%, say they would not attend, if the ticket price was higher. This proportion approximates that of Popular performing arts audiences (19%), however, it is somewhat higher than audiences overall (17%).

Interestingly, and as indicated in Table 3, the amount jazz/blues audiences report paying for a single ticket is actually higher than the amount they would be willing to pay, suggesting some resistance to increases in prices. Even among the jazz/blues attenders in the general public, the average amount they are willing to pay for a single ticket is notably lower than the amount jazz/blues audiences in fact recall paying.

2.16.5 DEMOGRAPHICS

Jazz/blues audiences are slightly more likely to be women, though the reverse is true in the general public. In general, the audience for jazz/blues performances is young: 40% are below age 35. Among the general public the proportion who are recent attenders is even larger, 61% are below 35 years of age. Consistent with the relative youth of the audience, 44% of the jazz/blues audiences surveyed are young and childless. Among the most frequent attenders in the audience, 52% are young and childless. The other significant audience segment are older couples without children: 23% of the jazz/bluesaudience surveyed fell into this category, although they are not frequent attenders and do appear as a significant segment among the general public.

Consistent with the relative youth of jazz/blues audiences, household income levels are modest, many (19%) (especially recent attenders among the public) are students, and education levels are only slightly above average.

Table 2
JAZZ/BLUES AUDIENCE: TICKET AND SUBSCRIPTION PRICE ISSUES

	JAZZ/ BLUES AUDIENCE	TOTAL POPULAR AUDIENCE
HOW MUCH PAID FOR YOUR TICKET?		
Less than $10	13	7
$10 - $14	7	14
$15 - $19	28	18
$20 - $24	20	15
$25 - $29	15	11
$30 - $34	1	8
$35 - $39	1	4
$40 - $49	1	4
$50 - $74	1	8
$75 or more	1	4
Gift	6	4
No opinion	8	5
Mean amount	$21	$28
ATTEND IF TICKET PRICE:		
$2.00 higher	28	28
$4.00 higher	20	20
$6.00 higher	7	9
$10.00 higher	11	15
NOT ATTEND IF ANY HIGHER	21	19
NO OPINION	13	9

Table 3
JAZZ/BLUES AUDIENCE: AMOUNT PAID FOR PERFORMANCE ATTENDED AND AMOUNT PREPARED TO PAY FOR A JAZZ/BLUES PERFORMANCE

	GIFT	$10- OR LESS	$11- $15	$16- $19	$20- $24	$25- $29	$30- $39	$40- $49	$50-OR MORE	MEAN AMOUNT	NOTHING/ NOT INTERESTED	NO OPINION
	%	%	%	%	%	%	%	%	%	$	%	%
JAZZ/BLUES AUDIENCE												
Amount paid *	6	13	7	28	20	15	1	1	3	$21	-	8
Amount prepared to pay	-	20	20	18	15	4	3	3	1	$16	10	8
GENERAL PUBLIC/Jazz blues attender**												
Amount prepared to pay	-	20	16	18	9	4	2	1	1	$15	34	6

* The categories for the amount paid question are slightly different: Less than $10, $10 - $14, $15 - $19. Thereafter the categories are the same.

** Reported that they attended a Jazz/Blues performance in the last six months.

Table 4

JAZZ/BLUES: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	JAZZ/ BLUES AUDIENCE %	DID NOT ATTEND %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %	GENERAL PUBLIC TOTAL %	NEVER ATTENDED %	ATTENDED IN LAST 5 YEARS %	ATTENDED IN LAST 6 MONTHS %
GENDER								
Male	40	36	39	44	46	47	55	56
Female	59	62	60	56	52	52	46	44
AGE								
16 - 24 years	9	8	8	14	16	14	16	25
25 - 34 years	21	17	14	35	26	24	32	36
35 - 44 years	17	12	20	19	24	23	29	22
45 - 54 years	17	14	21	13	14	15	10	11
55 - 64 years	17	19	20	12	10	12	7	15
65 years or older	18	30	17	7	10	12	6	2
HOUSEHOLD INCOME								
Less than $10,000	10	9	9	12	7	7	5	5
$10,000 - $19,999	11	10	9	15	14	14	7	11
$20,000 - $29,999	3	4	2	4	18	18	15	16
$30,000 - $39,999	12	11	14	11	17	17	17	17
$40,000 - $49,999	14	15	15	13	17	18	17	18
$50,000 - $59,999	12	14	12	11	11	11	13	10
$60,000 - $74,999	21	18	23	19	8	8	10	11
$75,000 or more	17	20	16	15	8	8	15	12
EDUCATION: Highest level								
Less th high sch.	4	5	5	0	18	21	7	7
High school diplo.	29	38	24	26	27	29	21	19
College	24	25	21	26	17	17	16	17
Some university	-	-	-	-	8	7	8	12
Bachelor's degree	24	16	26	30	13	11	21	20
Grad/Prof. degree	19	15	24	17	6	5	12	8
Student	-	-	-	-	12	10	14	19
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	23	17	18	37	24	11	30	47
Married, under 45, no child. at home	11	8	10	15	10	6	17	16
Married, under 45, child. present	11	12	12	9	29	28	38	25
Single parent	8	5	8	9	4	5	3	4
Married, 45 and +, child. present	11	14	13	5	9	13	5	3
Married, 45 and +, no child. at home	23	25	28	14	15	24	5	3
Single, 45 and +, no child. at home	13	18	11	9	8	13	2	2

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.17 Country and Western

2.17.1 Attendance Patterns

Among the general public, 75% of Canadians report that they have never attended a country and western performance. Among country and western audiences themselves, attendance at country and western performances is not very steady and more an occasional event, as 38% of the audiences only attended once or twice last season, while a further 34% claim not to have attended at all during that time period. Relative to other performance types, country and western audiences report one of the lowest regular attendance levels.

Country and western audiences are also unique in that they do not attend many other types of performances. Furthermore, although significant proportions of the country and western audience report attending comedy (42%), drama (40%) and musicals (39%) last season, the attendance levels are lower than that of other audience types.

At the same time the only group expressing any real interest among the general public in attending country and western performances are the country and western audience (60%). Among the general public, 16% express interest in attending country and western performances more frequently.

Similarly, it may be difficult to broaden the country and western audience base with other audience types. Other audiences (with the exception of folk audiences) report attending country and western performances less often than all other types of performances last season. Folk audiences (31%) and, to a lesser extent, ethnic/heritage audiences (24%), are most likely to have attended country and western performances last season. Not surprisingly then, folk (20%) and ethnic/heritage (13%) audiences are most interested in attending country and western performances more frequently, while less than 10% of other audience types express interest in attending these performances. It is therefore notable that this interest among audiences other than the country and western audiences is not very high.

Likewise, among the public who have attended a performance of some type in the last six months, interest in attending country and western performances is only slightly higher. Specifically, recent attenders to folk (30%), pop/rock (24%), ethnic/heritage (25%) and children's (23%) performances are somewhat more likely than average to indicate that they would like to see more country and western performances.

2.17.2 Expectations and Perceptions

The distinctiveness of the country and western audiences is further evident in their expectations and perceptions about popular music. Country and western audiences appear to be very passionate about popular music, and more so than other audience types. An overwhelming 79% of the country and western audiences agree somewhat/strongly (49% strongly agree) that "singers and popular musicians are real artists." In particular, 59% of the country and western audiences' most loyal supporters (i.e. who attended three or more times last season) agree strongly with the statement. These find-

ings are reflected to some extent in the fact that 53% of country and western audiences agree somewhat/strongly (27% agree strongly) that they "are personally affected by popular music."

Country and western audiences also prefer the social aspects of going to a performance more than other types of audiences, suggesting that at least some of them are not just attending for the actual performance. Overall, however, country and western audiences are divided in their agreement with the statement "you like to talk and socialize with friends while watching the performance" (29% agree somewhat/strongly and 33% disagree somewhat/strongly). Among country and western audiences, frequent attenders (38%) are more likely to disagree strongly than those who only went once or twice (5%) during the last complete season, suggesting that this subgroup of frequent attenders is more interested in the performance. Like other audiences whose performances often occur in clubs, close to half (48%) of country and western audiences would attend more performances in clubs if they were less smoky.

Although the finding that a slight majority (54%) of the country and western audiences disagrees with the statement "you prefer to see performers in a club than in a concert hall" contradicts the above finding, it is more likely a reflection of their dislike for the smoke currently present in clubs. It is notable that a quarter (24%) of the country and western audiences (and in particular those who attended three or more times last season (34%) disagree strongly with the statement, once again indicating the presence of a core group of passionate devotees of the music whose main interest is the performance.

Further analysis of the country and western audiences' expectations of performances reveals that a clear majority expect that performances will "allow you to forget problems" (71%) and "make you feel good" (68%). Furthermore, just over one-in-three expect country and western performances to "have strong emotional impact"(35%) and be "about real people facing real life situations" (35%). The audiences are not generally seeking performances that provide insight into themselves or social issues.

The expectations of the general public are relatively similar to those of the country and western audiences. The requirement that the performances be "about real people facing real life situations," be "entertaining," "allows you to forget problems"and "makes you feel good" is cited by 48%, 44%, 44% and 38% respectively, of the general public. The public are, however, less concerned than the audience about the emotional impact of a performance. Similarly, the public do not expect insight into themselves or social issues.

2.17.3 Ticket Purchasing Issues

Country and western audiences prefer to purchase their tickets in person. They are, however, split in terms of the venue they purchase from: 34% purchase in person through the box office, while 33% (higher than all other audiences) purchase in person through a ticket agency.

Table 1

COUNTRY AND WESTERN: STATEMENTS ABOUT POPULAR MUSIC

	Agree strongly %	Agree somewhat %	Agree/ Disagree slightly %	Somewhat Disagree %	Strongly Disagree %	No opinion %
Singers and pop musicians are real artists						
Total audience	31	31	24	5	3	6
Traditional audience	38	31	21	4	2	4
Country and western audience	49	30	19	0	0	3
If clubs less smoky might go more often						
Total audience	27	16	24	10	16	6
Traditional audience	31	18	24	9	14	4
Country and western audience	31	17	28	5	18	2
Prefer to see performers in club than in concert hall						
Total audience	13	15	27	15	26	5
Traditional audience	16	16	32	14	18	4
Country and western audience	16	9	42	7	24	3
Like to socialize with friends during performance						
Total audience	4	10	30	15	36	5
Traditional audience	7	11	34	16	28	4
Country and western audience	18	11	37	15	18	2
You are personally affected by popular music						
Total audience	11	20	35	14	15	5
Traditional audience	18	22	27	10	9	10
Country and western audience	27	26	36	5	5	2

2.17.4 PRICING ISSUES

Relative to other audience types, country and western audiences are most prepared to pay high ticket prices, as the average ticket price reported paid for a single ticket is $29 for country and western performances and is only surpassed by that of musicals (average of $39). This average ticket price paid by the country and western audience is comparable to that paid by the Popular audience (average of $28).

The results also indicate that many of the country and western audiences are relatively loyal attenders and that there is some price flexibility, albeit slightly less than that of Popular audiences, as only 23% report that they would not attend if the price is higher.

Conversely, two-in-three (67%) of the country and western audiences are prepared to pay at least $2 more; 40% are prepared to pay at least $4 more, and 25% are prepared to pay at least $6 more. A further 19% are prepared to pay $10 more, once again indicating the presence of a group of loyal attenders. This suggests that a slight increase in the ticket prices for country and western performances could be undertaken without significant opposition from their audiences.

Table 2

COUNTRY AND WESTERN AUDIENCE: TICKET AND SUBSCRIPTION PRICE ISSUES

	COUNTRY AND WESTERN AUDIENCE %	TOTAL POPULAR AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?			
Less than $10	*	7	10
$10 - $14	13	14	18
$15 - $19	10	18	21
$20 - $24	18	15	15
$25 - $29	3	11	9
$30 - $34	39	8	5
$35 - $39	3	4	3
$40 - $49	1	4	3
$50 - $74	4	8	4
$75 or more	1	3	2
Gift	2	3	4
No opinion	4	5	6
Mean amount	$29	$28	$23
ATTEND IF TICKET PRICE:			
$2.00 higher	27	28	28
$4.00 higher	15	20	21
$6.00 higher	6	9	10
$10.00 higher	19	15	14
NOT ATTEND IF ANY HIGHER:	23	19	17
No opinion	9	11	10

* Less than 0.5 percent

2.17.5 DEMOGRAPHICS

Country and western audiences are overwhelmingly women. Seven-in-ten (69%) of those surveyed at country and western performances were women, while only 31% were men. Interestingly, this strong gender split is not evident among the general public, where 53% and 51% of those attending country and western performances in the last five years and last six months, respectively, were women. Country and western audiences tend to be comprised of middle-aged individuals.

Among audiences, 66% of those reporting at least three attendances last season are 35 to 54 years of age. Likewise, among the general public, recent attenders are more likely than the public overall to be 35 to 54 years of age (41%).

While country and western audiences with household incomes of at least $50,000 are more likely to report attending at least one country and western performance last season, this trend is not apparent among the general public, where income is not related to attendance. Interestingly, among both the audience and the general public, those with a high school education are more likely to have attended at least one country and western performance last season.

An analysis of life cycle stages reveals that among the general public, the recent attenders are very similar to the life cycle profile of the population overall. That is, recent attenders among the public are young singles without children, younger parents with children, and "empty nesters." Among audiences, in addition, older parents and single parents are above average in their likelihood of being in the audience.

Table 3

COUNTRY & WESTERN: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	COUNTRY & WEST. AUDIENCE	DID NOT ATTEND	ATTENDED 1/2 TIMES	ATTENDED 3/4 TIMES	GENERAL PUBLIC TOTAL	NEVER ATTENDED	ATTENDED IN LAST 5 YEARS	ATTENDED IN LAST 6 MONTHS
	%	%	%	%	%	%	%	%
GENDER								
Male	31	35	24	34	46	49	47	49
Female	69	65	76	66	51	51	53	51
AGE								
16 - 24 years	8	15	8	0	16	17	8	14
25 - 34 years	27	24	37	17	26	26	25	30
35 - 44 years	29	26	29	31	24	23	28	21
45 - 54 years	24	24	16	35	14	12	17	19
55 - 64 years	12	12	8	17	10	10	12	9
65 years or older	1	0	3	0	10	11	10	7
HOUSEHOLD INCOME								
Less than $10,000	18	27	18	9	7	7	5	6
$10,000 - $19,999	11	13	9	13	14	13	18	15
$20,000 - $29,999	1	3	0	0	18	17	20	21
$30,000 - $39,999	18	17	21	17	17	16	18	18
$40,000 - $49,999	17	20	15	17	18	19	13	16
$50,000 - $59,999	13	7	15	17	11	11	10	10
$60,000 - $74,999	13	10	12	17	8	8	8	7
$75,000 or more	8	3	12	9	8	9	8	7
EDUCATION: Highest level								
Less th. high sch.	8	9	8	10	18	16	24	23
High school diplo.	58	44	71	59	27	25	32	32
College	19	32	5	21	17	17	17	16
Some university	-	-	-	-	8	8	8	8
Bachelor's degree	7	9	8	3	13	14	10	9
Grad/Prof. degree	7	6	8	7	6	7	5	3
Student	-	-	-	-	12	13	4	9
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	23	32	24	11	24	25	16	23
Married, under 45, no child. at home	6	6	8	4	10	10	9	12
Married, under 45, child. present	22	18	30	18	29	29	33	28
Single parent	14	15	11	18	4	4	5	5
Married, 45 and +, child. present	17	12	22	18	9	9	11	9
Married, 45 and +, no child. at home	12	6	5	29	15	15	16	14
Single, 45 and +, no child. at home	5	12	0	4	8	8	9	9

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.18 Performances for Children

2.18.1 INTRODUCTION

This section is analysed differently than the other types. A number of questions were put to parents of young children, in the general public survey, regarding their attendance behaviour and other aspects of their experiences with arts related programs for children. In addition, in both the audience and general public surveys, all respondents were asked questions about their recall of attending arts related activities as children. This section will deal with both these issues.

2.18.2 EXPERIENCES OF PARENTS

2.18.2.1 Parents in the Population

One third (35%) of the sample reported that they had children under the age of 16 years. In 80% of cases, this consisted of one (36%) or two (45%) children under 16 years. For close to half (46%) of these parents, one child, at least, was under six years of age, half (53%) had children between six and 12 years, and 30% had children between 13 and 16 years.

2.18.2.2 Activities Children Undertake

Table 1 indicates that parents report a diverse range of activities that their child(ren) have undertaken in the last year. Over two thirds of parents report that their children play team or individual sports. Two thirds also report that their children visited museums and art galleries, and over half report their children attended theatre, and that they were, at least during part of the year, learning a musical instrument. A third report that their child(ren) have sung in a choir. A quarter report art classes being taken, pop/rock concerts attended, and dance/ballet performances attended. However, fewer than one-in-five report dance and drama classes being taken, or classical music performances attended.

When the age of children is considered, then there is some, but not great, variations in their age. Those reporting children under six years of age are less likely to report attendance at classical music performances (15%), pop/rock concerts (15%), drama classes (8%), and learning a musical instrument (44%). Parents of teenagers on the other hand, were more likely to report greater attendance at pop/rock concerts (40%), and the taking of drama classes (18%), and less taking of dance classes (14%).

Overall, while the size of the community has some impact on reported levels of activity, the impact of community size is more evident in performance attendance than in taking classes. Thus, greater proportions of parents living in the three main urban centres report that their child(ren) attended performances of theatre (63%) and dance (31%) than parents living elsewhere. However, even in smaller communities of under 10,000, 43% of parents reported that their child(ren) attended a theatre performance in the last year.

Table 1

ACTIVITIES CHILDREN HAVE UNDERTAKEN IN THE LAST YEAR

		ORGANIZED BY			ACTIVITIES NOT UNDERTAKEN BUT INTERESTED
	UNDERTAKEN	SCHOOL	PARENT	CHILD(REN)	
	%	%	%	%	%
Play team sports	77	60	46	20	9
Visit museums/ art galleries	67	64	52	4	12
Play individual sports	67	34	55	34	10
Attend theatre performances	56	66	40	5	15
Learn a musical instrument	55	56	43	11	24
Sing in a choir	36	73	20	10	12
Take art classes	26	70	26	10	22
Attend pop/rock concerts	26	11	47	42	14
Attend dance/ ballet performances	25	51	44	8	19
Take dance/ballet classes	18	20	67	12	18
Take drama/acting classes	13	66	29	9	20

NOTE: Answers total to more than 100% because respondents were allowed more than one response.

Table 1 also shows just how big a role schools are playing in introducing the arts to young people. In almost all cases, more parents report that the school had organized a particular activity rather than the parents themselves. The activities in Table 1 therefore indicate the extent to which schools are involved, at least from a parent's point of view. Thus, most schools appear very involved in organizing visits to museums/art galleries and various types of performances, except pop/rock.

Parents are much more likely to be involved in their child(ren) taking dance/ballet lessons than schools, although schools appear to provide instructions in other arts related areas.

It is unclear the extent to which the proportion citing attendance at specific activities is a function of parent or child(ren)'s interest in undertaking specific activities or the extent to which schools organize or provide these activities. For example, does the fact that 56% of parents report that their child attended a theatrical performance in the last year, while only 25% report attendance at a dance/ballet performance, mean that schools are less likely to provide for one type of experience rather than the other or that parents are more likely to recall theatre attendance rather than dance/ballet attendance, or that parents and/or child(ren) wanted to attend the one type of performance, but not the other.

If a child is not already involved in an activity, it appears that few parents express much demand for additional involvement. The last column in Table 1 shows that in most instances fewer than one-in-five parents who did not report a specific activity being undertaken would like their child(ren) involved. The strongest expression of interest is in the area of learning a musical instrument, but only a quarter of parents with children not undertaking this activity indicate that this is something they would like their child to do.

The orientation of parents regarding the arts also appears to be a crucial factor in parent's reporting of the arts related activities of their children. Both in terms of psychographic types and reported attendance at Traditional performing arts events, those parents with the most positive psychographic orientations toward the arts and those reporting attending a performance at least once in the last six months, were more likely to report that their child(ren) had either attended a performance or had taken classes. To illustrate, while 75% of parents identified as the arts Devoted indicated that their child(ren) attended theatre performances in the last year, only 46% of those described as the Uninvolved reported attendance by their child(ren). Similarly, while 41% of the Devoted report a child's attendance at a dance/ballet performance, only 24% of the Uninvolved segment report this.

Certain types of activities, however, are not undertaken that frequently even by a large proportion of the offspring of the more positive psychographic segments. Thus, only 25% of the Arts Devoted report a child's attendance at a classical music performance, while 19% of this segment report a child taking drama classes. In both these cases, however, parents with the more positive orientation toward the arts continued to be the most likely to report a child's involvement.

A part of the reason that parents with positive orientations toward the arts are more likely to report their child(ren)'s involvement is that they are more likely to indicate that they have themselves taken a child to a performance. In the case of theatre, while majorities of all parents report the school's role in organizing theatre performances, 54% of Devoted parents, in addition, report that they have organized attendance themselves, while only 32% of the Uninvolved report parent-organized theatre attendance.

Museum and art gallery attendance also appears to follow a similar pattern. While 76% of the Devoted report their involvement in their child(ren) visiting a museum or art gallery, 50% of the Conditionals and 33% of the Uninvolved report such activity.

The above results would clearly seem to confirm the importance of the parent in the involvement of the child in arts related activities.

2.18.2.3 Evaluations of Attendance

Overall, while a majority (56%) of parents report that their child(ren) have attended a theatrical performances of some kind in the last year and lower levels of attendance for other performance types, there is considerable demand, as shown in Table 2, on the part of parents that their child(ren) attend more Traditional performing arts events. Demand is also fairly high for more school programs devoted to the performing and visual arts. Just over half of parents say there are not enough programs.

Table 2
PARENT'S DESIRE FOR PERFORMANCES AND PROGRAMS

	CHILD'S ATTENDANCE AT TRADITIONAL ARTS PERFORMANCES %	SCHOOL PROGRAMS DEVOTED TO THE PERFORMING AND VISUAL ARTS %
Too few/not enough	68	54
About the right number	28	41
Too many	0*	2
No opinion	3	3

* Indicates less than 0.5%

The interest in greater child attendance at Traditional performing arts events and in more school programming exists across all psychographic segments and this demand is high for parents with children of all age groups. For example, while 71% of the Devoted say their child(ren) attends too few performances and 59% say there are too few school programs, 63% and 51% respectively, of the Uninvolved say this.

While a large proportion of parents would like their child(ren) to attend more Traditional performances, the amount they are prepared to pay for school field trips does not appear to be that great. A plurality (41%) of parents, as shown in Table 3, are prepared to spend up to $5, while close to half (47%) are prepared to pay up to $10. Few are prepared to pay up to $20. Much the same situation is apparent for visits to arts galleries.

Table 3
PARENTAL WILLINGNESS TO PAY FOR SCHOOL FIELD TRIPS FOR THEATRE PERFORMANCES AND ART GALLERY VISITS

MAXIMAL AMOUNT PREPARED TO PAY	ATTEND PERFORMANCE %	VISIT ART GALLERY %
Nothing	8	15
Up to $5 a time	41	44
Up to $10 a time	35	21
Up to $20 a time	12	6
No opinion	4	14

Variations in the amount parents are prepared to pay by orientation toward the arts are minimal. Those with little interest or involvement are little different in the amount they are prepared to pay than those with a high level of interest. Similarly, parental income has little impact on the amount parents are prepared to pay for field trips.

2.18.2.4 Reasons for Children Not Attending Performances More Frequently

There are two main reasons that parent's give for why their child(ren) do not attend as many traditional arts performances as they would like. These are, as shown in Table 4, the high cost of performances and the limited availability of such performances. Although the latter reason suggests a need for more children's performances, it may also be possible, however, that parents are not aware of what is available. If this is the case then it may be a question of appropriate promotion rather than actual availability.

In all likelihood, both factors are at work. The evidence for this comes from two sources. First, in terms of limited availability, there is a very strong relationship between the size of community and extent to which respondents cite availability as the reason for saying their child(ren) attend too few performances. For example, while 33% of those in communities in excess of 100,000 persons cite this reason, the rate climbs to 66% and 85%, respectively, in communities of between 10,000 to 99,999 and in communities of less than 10,000. In terms of awareness, as noted earlier in this report, those with higher levels of education tend to be the ones who report greater newspaper readership and greater interest in finding out about the performing arts. Those with higher levels of education are also the least likely to cite that there are not enough shows for children and that there are few performances in their community. This relation holds, even when the influence of community size is controlled for. The implication here is that parents giving the limited availability of performances as a reason for less frequent attendance than they would wish, simply may be relatively unaware of what is, in fact, available for children in their community or through schools. Alternatively, they may be reflecting the lack of performances for children provided in the community.

Table 4
MAIN REASONS CHILD(REN) DOES NOT ATTEND MORE PERFORMANCES

	%
Too expensive	57
Not enough shows for children	53
Few shows/performances in community	51
Schools don't take children often enough	36
Children prefer other activities	26
Shows/performances at inconvenient times	25
Little time available	23
Material not appropriate	21
Don't enjoy going	3
Children too disruptive	3

2.18.3 Recall of Childhood Involvement in Arts Activities

Substantial proportions of the population recall attending performances in the traditional arts types as a child. Table 5 shows that over half (58%) recall attending theatre performances, over a third (37%) recall attending ballet/dance performances, and a quarter (26%) recall attending classical music performances. Half also recall attending performances for children.

Among audiences, for both theatre and classical music performances, the proportion recalling attendance is generally higher than among the general public. However, for dance it is approximately the same.

Table 5 also shows that most who recall attending enjoyed the experience. Among the general public, respondents were simply asked if they enjoyed the experience or not, while the audience were asked their level of enjoyment. When the question is asked in this latter manner there is some variation in the intensity of enjoyment. Theatrical performances and musicals are universally enjoyed by those recalling attending as a child. Fully 78% say they found the experience very enjoyable. For the other performance types shown in Table 5, between half and two thirds say they were very enjoyable experiences. Presumably, these results suggest that young people find it easier to enjoy theatre than other types of performances.

Table 5

CHILDHOOD PERFORMING ARTS EXPERIENCES

	AUDIENCE			GENERAL PUBLIC		
	Recall Attending	Very enjoyable Experience	Under 10 years when first Attended	Recall Attending	Enjoy Experience	Under 10 years when first Attended
	%	%	%	%	%	%
Theatre/musicals	67	78	40	58	93	37
Classical music	45	55	31	26	81	32
Dance	41	63	42	37	86	39
Children's performances	-	-	-	52	93	60
Ethnic/heritage performances	34	53	47	-	-	-
Choral music	45	48	42	-	-	-

In addition, Table 5 indicates that both audience and general public report first attending performances after the age of 10. However, a third or more do report first attendance before the age of 10.

In addition to the activities shown in Table 5, a substantial number of audiences and general public also report recalling a variety of other arts related activities. While participation in team sports is the activity cited by the largest proportion of respondents, over half the audience report either frequently or occasionally learning a musical

instrument, singing in a choir, and visiting museums. The general public also report fairly substantial involvement in these activities. In many ways, the ranking of activities adults report undertaking as children is similar to that reported by parents regarding their own child(ren)'s activities in the last year.

Table 6
ACTIVITIES RECALLED BEING UNDERTAKEN AS A CHILD

	AUDIENCE		GENERAL PUBLIC
	FREQUENTLY UNDERTOOK	OCCASIONALLY UNDERTOOK	REGULARLY UNDERTOOK
	%	%	%
Playing team sports	36	28	69
Learn musical instrument	37	20	43
Singing in choir	30	24	43
Playing individual sports	29	29	50
Visiting museums	14	44	33
Taking dance/ballet classes	13	11	15
Taking art classes	13	19	19
Taking drama/acting	8	11	10
Visiting art galleries	8	31	14

There are a number of interesting age variations in reported attendance by audiences at the various types shown in Table 5 and 6. For a number of types, as the respondent's age increases the proportion reporting attendance as a child decreases. This is especially the case for theatre, dance,and ethnic/heritage performance attendance. Classical music and choral music show little reported variation with age of respondent.

At the same time, Table 7 also shows that younger members of the audience report attending performances at an earlier age than their older counterparts. As well a larger proportion of younger audience members report undertaking various types of classes and lessons than older audience members. The notable exception is singing in a choir, where the proportion noting this activity is relatively uninfluenced by age.

An obvious question regarding these results is the extent to which the age of a respondent is influencing their recall of their childhood behaviour and the extent to which these figures represent change over time in the exposure of young people across Canada to the performing arts. If there were a consistent tendency for age to influence recall, then presumably all items shown in Table 7 would show the same pattern as the age of respondents increases. But this persistent pattern does not exist, there are a variety of exceptions. For example, there is little relationship between reporting singing in a choir and age.

Table 7

AGE OF AUDIENCE RESPONDENT AND ATTENDANCE PATTERNS AS A CHILD

	16 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65 AND OVER
PERCENT RECALL ATTENDING						
Theatre/musicals	85	76	64	65	62	54
Classical music	51	45	45	48	46	40
Choral music	48	43	43	51	49	40
Dance	61	50	41	38	34	26
Ethnic/heritage	45	43	37	35	27	21
PERCENT ATTENDING BEFORE AGE OF 11 YEARS						
Theatre/musicals	51	43	37	40	34	30
Classical music	43	40	32	29	24	18
Choral music	51	52	44	44	32	28
Dance	53	46	42	40	36	27
Ethnic/heritage	51	51	48	45	41	35
PERCENT FREQUENTLY/ OCCASIONALLY UNDERTOOK						
Dance/ballet lessons	37	27	25	23	19	18
Drama/acting lessons	33	23	17	17	16	12
Musicals instruments	74	61	48	52	55	54
Singing in choir	54	46	52	60	58	53
Team sports	74	69	60	61	61	56
Individual sports	70	67	56	56	54	47

While there may be no general tendency to not recall involvement in the arts as a child, it is unlikely that recall will improve with age. Table 7 appears to suggest there is no consistent failure to recall across all items. If this is the case, it suggests that there is some evidence that, in fact, in many instances, attendance is more likely among younger age cohorts than among their older counterparts. This suggests that exposure to the performing arts for young people is probably greater in the recent past, than 20 years or so ago. If this is the case, then the role of the school and more general availability of the arts are probably vital in this regard. As noted earlier, most parents reported that school activities were the main form of exposure for their children to the performing arts.

This exposure is confirmed for both audiences and general public when reporting on who they generally attended performances with. For the general public it is more likely to be schools, while for the audience it is more likely to be parents (See Table 8).

Table 8

CIRCUMSTANCES SURROUNDING ATTENDANCE

WHO DID YOU GENERALLY ATTEND PERFORMANCES WITH:	AUDIENCE %	GENERAL PUBLIC %
School	19	35
Parents	28	20
Alone/friends	9	8
Combination of above	36	34
Artists came to school	4	-

2.18.4 THE RELATIONSHIP BETWEEN CHILDHOOD EXPOSURE AND ADULT ATTENDANCE

Childhood experiences appear to have a measurable impact on adult attendance as Table 9 makes clear. Those among the general public who report attending a performance as a child are much more likely to report attending a performance in the last six months, compared with the population overall and with those who have no recall of attendance. Similarly, experience in undertaking classes or lessons is also associated with more frequent reporting of recent attendance, especially in terms of those recalling dance and drama classes.

Moreover, while it appears that schools may be providing more exposure to the arts today than in the past, Table 9 indicates that, in fact, parents are the most important factor associated with attendance at a performance. Schools, however, do have an impact. In all, 46% of those who report attending only through school organized events, say they attended a Traditional performing arts type in the last six months, compared to 39% who recall no exposure to the performing arts.

Table 9
RELATIONSHIP BETWEEN CHILDHOOD EXPERIENCES WITH THE PERFORMING ARTS AND RECENT ATTENDANCE AT TRADITIONAL PERFORMING ARTS TYPES

	ATTENDED IN LAST SIX MONTHS	ATTENDED IN LAST FIVE YEARS
RECALL ATTENDING AS A CHILD	%	%
Theatre	53	21
Dance	54	21
Classical music	62	19
Children's performances	54	21
Do not recall attending	31	22
WHO ATTENDED PERFORMANCES WITH		
School	46	21
Parents	56	20
Alone/friends	36	20
Combination of above	56	20
Do not recall attending	39	21
ACTIVITIES UNDERTAKEN REGULARLY AS A CHILD		
Taking dance/ballet classes	57	23
Taking drama/acting	60	19
Learning a musical instrument	52	22
Singing in a choir	51	22
Total sample	46	21

While it appears that there is a relationship between childhood exposure to the performing arts and current attendance, a caveat must be introduced. The data analysed in this section is based on recall of experiences in childhood. It is well documented that current experiences influence what a person is able to recall from childhood. This means that some of the relationships identified above may be the result of current experiences. Thus, those who are recent attenders of the performing arts may be more likely than non-attenders to recall performances and lessons attended during childhood.

Having said this, however, there are enough variations reviewed earlier to suggest that no simple relationship, as described in the caveat above applies. While there may be some linkage between current behaviour and recall of childhood events, this in all likelihood does not explain all the relationships noted.

Just as there is a relationship between recall of childhood involvement with the performing arts and present behaviour, so the same relationship applies to the visual arts and crafts.

Table 10 shows that those among the audience and the general public who report visiting galleries or museums or taking arts classes as a child are somewhat more likely than those who do not to report purchasing art and craft work.

Table 10

RELATIONSHIP BETWEEN INVOLVEMENT WITH THE VISUAL ARTS AND CURRENT VISUAL ARTS AND CRAFTS PURCHASING BEHAVIOUR

	PURCHASED LAST YEAR	PURCHASED LAST FIVE YEARS	NEVER PURCHASED	NOT ASKED	PURCHASED LAST YEAR	PURCHASED LAST FIVE YEARS	NEVER PURCHASED	NOT ASKED
	%	%	%	%	%	%	%	%
ACTIVITIES UNDERTAKEN REGULARLY AS A CHILD								
Visiting art galleries	32	24	39	5	27	16	52	5
Visiting museums	28	24	43	5	26	16	54	5
Taking art classes	29	25	40	6	26	15	52	6
Total Sample	24	20	44	12	18	13	57	12

2.18.5 ATTENDING CHILDREN'S PERFORMANCES

2.18.5.1 Attendance Patterns

One quarter of the general public report having attended a performance for children, and 16% of the general public report attending in the last six months. However, given the nature of the product, it is clear that only parents or those taking children for an outing are likely to have any great interest in children's performances. This is made clear by Table 11 which shows attendance by stage of the life cycle. Close to half of those who report attendance are young couples with children at home.

Moreover, and based on the audience data, young parents are also likely to report regular attendance. Clearly, while young parents are less likely than other groups to attend other types of performances precisely because they are parents, their status as parent(s) facilitates extensive involvement with children's performances.

Having said this, however, only a minority (27%) of young parents, that is those who are under 45 years of age with children living at home, in fact reported attending children's performances in the last six months. This suggests that there are still considerable opportunities for building an audience for children's performances.

2.18.5.2 Ticket Prices

As noted earlier regarding paying for school field trips, parents and others taking children to performances do not expect to pay a great deal for tickets. In fact, as Table 11 shows 70% of audiences at children's performances paid less than $15 a ticket, while four-in-ten paid less than $10 a ticket.

They are also not willing to pay very much more. Table 11 also shows that 20% say they would not attend if they had to pay more, although 62% say they would pay $2 more. In all 47% say they will pay $4 more for a ticket. Clearly, there are some opportunities to raise prices by $2, but no more. Even at this, given the low ticket price paid, $2 represents a significant price increase.

Table 11

CHILDREN'S THEATRE AUDIENCE: TICKET AND SUBSCRIPTION PRICE ISSUES

	CHILDREN'S THEATRE AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?		
Less than $10	39	10
$10 - $14	31	18
$15 - $19	12	21
$20 - $24	5	15
$25 - $29	1	9
$30 - $34	1	5
$35 - $39	1	3
$40 - $49	1	3
$50 - $74	4	4
$75 or more	1	2
Gift	2	4
No opinion	4	6
ATTEND IF TICKET PRICE:		
$2.00 higher	35	28
$4.00 higher	16	21
$6.00 higher	10	10
$10.00 higher	11	14
NOT ATTEND IF ANY HIGHER:	20	17
No opinion	8	10

2.18.5.3 Expectations of a Performance

Allowing you to forget your problems (58%), making you feel good (54%) and having a strong emotional impact (53%) are cited as the top three expectations audiences of children's theatre have of a performance. Among the general public, the top three expectations of a children's theatre performance include that the performance be entertaining (45%), (which was not offered as a category to audiences), that it allows you to forget your problems (44%) and that it makes you feel good (43%). While a slim majority of children's theatre audiences expect that performances have a strong emotional impact, less than three-in-ten (26%) from the general public cite this.

Finally, that the performance be about real people facing real life situations is of more importance to the general public than to audiences (42% compared with 27% cite this).

2.18.5.4 Demographics

Children's theatre audiences are overwhelmingly composed of women, especially among those most frequent attenders, where women make up over three quarters (77%) of the populace. Clearly, mothers are accompanying their children to performances, rather than fathers. In terms of other demographic variations among audiences, the plurality are between the ages of 25 and 44 years (69%) and have annual household incomes in excess of $50,000 (61%).

Among the general public, the gender difference is not great. However, the plurality of children's theatre attenders, particularly those who attended in the last six months, are between the ages of 25 and 44 years.

In terms of life cycle, well over half (58%) of the most frequent attenders of children's theatre audiences are young couples with children. This holds true among the general public as well. In addition, among the general public, just over one-in-five of those who report attending in the last six months are young singles with no children.

Table 12
CHILDREN THEATRE: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	CHILDREN THEATRE AUDIENCE %	DID NOT ATTEND %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %	GENERAL PUBLIC TOTAL %	NEVER ATTENDED %	ATTENDED IN LAST 5 YEARS %	ATTENDED IN LAST 6 MONTHS %
GENDER								
Male	28	37	23	23	46	50	46	46
Female	72	62	77	77	52	50	54	54
AGE								
16 - 24 years	12	18	9	9	16	16	12	16
25 - 34 years	28	27	27	32	26	25	27	31
35 - 44 years	41	30	44	48	24	20	35	34
45 - 54 years	10	13	10	4	14	15	12	10
55 - 64 years	5	6	4	4	10	12	8	5
65 years or older	4	4	5	2	10	11	7	5
HOUSEHOLD INCOME								
Less than $10,000	5	11	2	5	7	7	6	4
$10,000 - $19,999	6	13	3	2	14	14	11	11
$20,000 - $29,999	4	1	2	10	18	19	17	14
$30,000 - $39,999	13	15	10	17	17	17	17	17
$40,000 - $49,999	11	7	12	16	11	17	18	19
$50,000 - $59,999	15	17	14	14	8	11	11	13
$60,000 - $74,999	25	23	30	19	8	8	8	9
$75,000 or more	21	13	28	17	8	7	12	12
EDUCATION: Highest level								
Less th. high sch.	3	2	3	3	18	21	12	10
High school diplo.	23	29	21	17	27	28	23	22
College	26	24	23	33	17	17	18	17
Some university	-	-	-	-	8	7	10	9
Bachelor's degree	29	26	33	20	13	11	19	15
Grad/Prof. degree	20	16	19	27	6	4	7	9
Student	-	-	-	-	12	11	10	16
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	17	27	10	17	24	25	17	21
Married, under 45, no child. at home	6	11	5	0	10	12	6	5
Married, under 45, child. present	51	33	61	58	29	23	46	48
Single parent	9	8	7	16	4	4	4	7
Married, 45 and +, child. present	8	11	7	3	9	10	8	7
Married, 45 and +, no child. at home	6	7	7	3	15	17	12	8
Single, 45 and +, no child. at home	3	3	2	3	8	10	6	3

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.19 Ethnic/Heritage Performances

2.19.1 Ethnic Group Attendance and Purchasing Overview at Ethnic/Heritage Performances

Canada is a multi-ethnic society. While the two largest ethnic groups, at least in terms of the general public survey, are those who define their ancestry in terms of either British/Irish (44%) or French (24%), the remaining 32% come from a variety of backgrounds, although most (26%) are European. Fourteen percent report their background as Northern European, 7% as Eastern European and 5% as Mediterranean (Italian, Greek, Spanish, or Portuguese). A further 2% report their background as Asian, 1% say they are Native Canadians, 2% report their background as being from some other part of the world; typically this would mostly include visible minorities.

When ethnic variations in the involvement of the general public in the performing arts are considered, Table 1 indicates that ethnic variations in attendance at arts' performances and art purchasing are not great.

In terms of Traditional performing arts attendance, variations in attendance are minimal, with the exception of those of Eastern European background, who are somewhat less likely to report attendance in the last six months.

Attendance at Popular performing arts events indicates that while all ethnic groups shown in Table 1 report high proportions of attendance, it is those of Mediterranean background who are the most likely to report attending. Among this group, fully 70% report attending a Popular type performance in the previous six months.

Not unexpectedly, the one performance type that shows great variation by ethnic identity is that of ethnic/heritage performances.[1] While overall, 13% of the general public report attendance at this type of performance in the last six months, attendance by those of British/Irish and French background[2] is below this level. As Table 1 shows, only 10% of these groups report attendance. Attendance is highest among those of Mediterranean, Eastern European, and "other backgrounds."[3] Among Asian Canadians, 19% report attending an ethnic/heritage performance on the last six months.

Art purchasing, as Table 1 also indicates, shows few variations by ethnic background, but there are considerable variations in craft purchasing patterns. Those of British/Irish, Northern and Eastern European background are the most likely to report purchasing a work of craft in the last year. Those of French and Asian background, on the other hand, are the least likely to report purchasing a work of craft in the last year.

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1 A caution is necessary in interpreting the results of the ethnic/heritage performances, at least in terms of the involvement of ethnic groups. Only a few ethnic/heritage performances were surveyed and questionnaires were only available in English or French. The effect of these limitations is that only certain ethnic groups' performances would be included in the survey and those who were uncomfortable in answering questions in English or French would likely not answer the questionnaire.

2 The term French in the text refers to those who answered French, Acadian, French Canadian, Québécois, etc. in the question on ancestry.

3 *Other* largely consists of visible minorities, i.e. those of Caribbean, African, Latin American and Middle Eastern background.

2.19.2 ATTENDANCE

Just under one quarter of Canadians throughout the general public report having attended an ethnic/heritage performance in the last six months (13%) or at least in the last five years (11%). Among those who constitute the current audience, the slim majority (51%) attended once or twice in the last complete season, with under one quarter (23%) having attended three or four times.

Table 1

GENERAL PUBLIC: ETHNIC VARIATIONS IN PERFORMANCE ATTENDANCE AND PURCHASE BEHAVIOUR

	TOTAL	BRITISH/ IRISH	FRENCH/ FRENCH CDN.	MEDITERR-ANEAN	NORTHERN EUROPEAN	EASTERN EUROPEAN	ASIAN	OTHER
ETHNIC/HERITAGE								
Never	76	80	80	58	72	60	68	63
Last five years	11	9	10	18	13	17	13	10
Last six months	13	10	10	25	15	23	19	23
TRADITIONAL PERFORMING ARTS								
Never	32	32	27	33	32	44	33	32
Last five years	21	21	21	23	23	20	20	21
Last six months	46	47	51	44	46	36	47	47
POPULAR PERFORMING ARTS								
Never	20	20	22	14	17	16	18	19
Last five years	24	24	24	16	25	25	24	20
Last six months	55	56	55	70	57	58	58	61
ART PURCHASING BEHAVIOUR								
Never/not asked	56	56	55	59	56	53	68	54
Last five years	20	20	21	21	22	23	15	20
Last year	24	24	23	21	23	23	17	25
CRAFT PURCHASING BEHAVIOUR								
Never/Not asked	69	63	76	70	64	64	84	70
Last five years	13	15	11	13	15	11	9	11
Last year	18	23	12	17	21	25	8	19

There is some interest in attending more ethnic/heritage performances expressed by both the general public and ethnic/heritage audiences. Among the general public, however, this interest is not all that great. In fact, less than one-in-five (17%) Canadians say they would like to attend this type of performance more frequently. In comparison,

nearly one third (31%) of ethnic/heritage audiences express an interest in more frequent attendance. Interest, in fact, is highest among those who attended a performance once or twice in the last season (20%), and notably lower among those who attended three or four performances (7%), or attended no performances (4%).

In broadening the audience base of ethnic/heritage performances, one option is to identify potential audiences of other performing arts products. Clearly, a number of audiences of other performing arts types also attend ethnic/heritage performances. These include theatre-drama (54%), folk (48%), theatre-comedy (41%), musicals (37%) and jazz/blues audiences (37%). Those expressing an interest in attending ethnic/heritage performances more frequently include audiences of theatre-drama (19%), folk (19%), stand-up comedy (19%) and opera (18%).

General public attenders of theatre-comedy (54%), theatre-drama (49%), pop/rock (41%) and stand-up comedy (41%) are most likely to express an interest in attending ethnic/heritage performances more frequently.

2.19.3 EXPECTATIONS

Over half of ethnic/heritage audiences expect a performance to have a strong emotional impact (58%) and make you feel good (57%). A significant minority of over four-in-ten expect a performance to allow you to forget your problems. While among the general public, no single expectation receives mention by a majority, significant proportions cite allowing you to forget your problems (45%), being entertained (45%), making you feel good (42%) and being about real people facing real life situations (41%) as top expectations of a performance. While having a strong emotional impact emerged as the top expectation among audiences, less than one quarter of the general public mention this.

2.19.4 TICKET PURCHASING

On average, ethnic/heritage audiences paid slightly less for the price of a single ticket, compared with audiences overall ($19 compared to $23). While over four-in-ten (41%) among ethnic/heritage audiences recall paying less than fifteen dollars for a single ticket, only 28% of audiences overall recall paying this amount. Further, very few (4%) among ethnic/heritage audiences report paying thirty-five dollars or more, compared with just over one-in-ten (12%) from audiences overall (see Table 2).

In terms of price flexibility, close to seven-in-ten (69%) say they would be willing to pay an additional two dollars for the price of a single ticket. Nearly four-in-ten (38%) would be willing to pay at least four dollars more. Approximating the average of audiences overall, one-in-five ethnic/heritage audiences say they would not attend if the price were any higher.

The majority (53%) of ethnic/heritage audiences purchase their ticket in person at the box office. This proportion is notably higher than that of audiences overall. Slightly lower than the average for all audiences, 15% of ethnic/heritage audiences purchase their ticket by telephone at the box office. A similar proportion (14%) purchase tickets in person through a ticket agency.

Table 2

ETHNIC-HERITAGE AUDIENCE: TICKET AND SUBSCRIPTION PRICE ISSUES

	ETHNIC-HERITAGE AUDIENCE %	TOTAL AUDIENCE %
HOW MUCH PAID FOR YOUR TICKET?		
Less than $10	17	10
$10 - $14	24	18
$15 - $19	14	21
$20 - $24	14	15
$25 - $29	10	9
$30 - $34	8	5
$35 - $39	1	3
$40 - $49	1	3
$50 - $74	1	4
$75 or more	1	2
Gift	3	4
No opinion	6	6
ATTEND IF TICKET PRICE:		
$2.00 higher	31	28
$4.00 higher	19	21
$6.00 higher	7	10
$10.00 higher	12	14
NOT ATTEND IF ANY HIGHER:	20	17
No opinion	10	10

2.19.5 DEMOGRAPHICS

In terms of demographic variations of ethnic/heritage audiences, women tend to be the more likely to report attendance among audiences; however, among those who attended a performance three or four times in the past season, the gender difference is minimal (see Table 3).

Among the audience, all age groups appear to attend performances, although it is those under age 45 who are the most frequent attenders. Among the general public there is no real link between age and attendance. Income and education variations in reported attendance are minimal. As with audiences generally, the audience surveyed at a ethnic/heritage performance have higher incomes and higher levels of education than the general public. Among the public, this audience appears close to the norm.

Young singles with no children are among the more frequent attenders of ethnic/heritage performances for both audiences and general public. Interestingly, young married couples with children are also more likely to be frequent attenders of ethnic/heritage performances. Given that they are usually underrepresented at most performance types, their attendance at this type of performance may well be because they take their children to performances.

Table 3
ETHNIC/HERITAGE: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	AUDIENCE ATTENDANCE LAST SEASON				GENERAL PUBLIC			
	ETHNIC/ HERITAGEA UDIENCE %	DID NOT ATTEND %	ATTENDED 1/2 TIMES %	ATTENDED 3/4 TIMES %	GENERAL PUBLIC TOTAL %	NEVER ATTENDED %	ATTENDED IN LAST 5 YEARS %	ATTENDED IN LAST 6 MONTHS %
GENDER								
Male	38	36	32	53	46	50	46	46
Female	61	62	67	47	52	50	54	54
AGE								
16 - 24 years	11	7	10	17	16	16	13	20
25 - 34 years	21	31	21	13	26	26	27	25
35 - 44 years	29	24	23	45	24	24	25	21
45 - 54 years	17	17	20	11	14	14	13	16
55 - 64 years	11	12	12	8	10	10	12	10
65 years or older	11	10	13	6	10	10	9	7
HOUSEHOLD INCOME								
Less than $10,000	14	8	14	20	7	7	6	6
$10,000 - $19,999	12	8	13	12	14	14	13	13
$20,000 - $29,999	1	0	1	2	18	18	17	18
$30,000 - $39,999	12	13	11	15	17	17	17	16
$40,000 - $49,999	15	24	12	15	11	18	17	17
$50,000 - $59,999	11	21	9	5	8	11	12	12
$60,000 - $74,999	19	13	21	20	8	8	9	8
$75,000 or more	16	13	19	12	8	8	10	10
EDUCATION: Highest level								
Less th. high sch.	5	5	4	6	18	21	12	10
High school diplo.	30	38	26	30	27	28	23	22
College	21	21	20	21	17	17	18	17
Some university	-	-	-	-	8	7	10	9
Bachelor's degree	30	24	31	34	13	11	19	15
Grad/Prof. degree	14	12	18	8	6	4	7	9
Student	-	-	-	-	12	11	10	16
LIFE CYCLE STAGE*								
Single, under 45 no child. at home	27	30	24	29	24	23	24	29
Married, under 45, no child. at home	14	18	14	13	10	10	12	12
Married, under 45, child. present	17	12	16	24	29	31	26	22
Single parent	6	5	5	9	4	4	5	5
Married, 45 and +, child. present	13	20	14	4	9	9	9	10
Married, 45 and +, no child. at home	16	8	20	16	15	15	16	14
Single, 45 and +, no child. at home	7	8	8	4	8	8	8	8

* For the audience the categories are $60,000 - $79,999 and $80,000 or more.

2.20 Festivals

2.20.1 ATTENDANCE PATTERNS

Unlike other audiences, who appear to be familiar with the performing arts type they are attending, four-in-ten (42%) of festival audiences are newcomers to the festival they are attending. This does not automatically mean, however, that they are new audiences for the type they are attending.

That many of those surveyed at a festival are newcomers to the festival is also confirmed by the fact that 42% report that this is their first year of attendance. At the same time, a further 16% report that this is their second year of attendance, and 14% report that it is their third year. This indicates that 70% of festival audiences have been attending less than four years.

Festivals appear to be events where the audience experiments with different types of performances. In all, 60% report that they go to the kinds of performances with which they are not usually familiar. This experimentation appears to be a feature of audiences for all types of festivals. Irrespective of type attended, majorities in virtually all types report that they go to performance types with which they are unfamiliar. This experimentation appears, in some instances, to lead to audience development.

The evidence for this comes from the fact that a third of festival audiences report that, as a result of being exposed to new types of performances at a festival, they have then bought tickets for performances during the regular season. This appears to be especially the case for the performing arts types of contemporary dance (35%), avant-garde theatre (40%), symphonic music (43%), pop/rock (39%), jazz/blues (37%), folk (50%) and country music (53%).

The mood of willingness of audiences to try something new is quite strong for all types of performing arts, as Table 1 shows. Some caution, however, must be exercised in interpreting the results of Table 1, because of the high proportion of *no opinions*.

For the question concerning curiosity about a performance type at a festival, the no opinion category exceeds half the sample. This likely means that many of those who were not curious about a performance type simply did not mark the appropriate box, indicating that they in fact had no curiosity about a type of performance, and only marked a category if they were curious. In interpreting the level of curiosity by type, the two sets of figures in the columns excluding *no opinions* and the one including *no opinions*, should be considered as the range within which the "true" level of curiosity lies. However, even taking the low estimate, that is the proportion including *no opinions*, a significant proportion of the festival audience indicate that they would be curious about various types of performances. In all cases but one (country music), a quarter or more for each type shown in Table 1 say they would be curious about each type in a festival context. In particular, over one third say they would be curious about drama (36%), theatre-comedy (39%), symphonic music (33%), jazz/blues (38%), folk (35%), musicals (34%), stand-up comedy (36%) and ethnic/heritage performances (35%).

Table 1
COMPARISON OF FESTIVAL AND NON FESTIVAL CONTEXT FOR AROUSING INTEREST AND CURIOSITY IN SPECIFIC TYPES OF PERFORMANCES

	PERCENT CURIOUS AT A FESTIVAL			PERCENT INTERESTED DURING THE SEASON		
	EXCLUDING NO OPINION %	INCLUDING NO OPINION %	NO OPINION %	EXCLUDING NO OPINION %	INCLUDING NO OPINION %	NO OPINION %
TRADITIONAL						
Ballet	62	29	54	63	41	35
Contemporary dance	64	30	53	56	34	40
Theatre-drama	78	36	53	83	56	33
Theatre-comedy	85	39	54	87	59	32
Theatre- avant-garde	65	30	54	55	31	43
Symphonic music	72	33	54	75	50	33
Chamber/soloists	64	30	54	62	39	37
Opera	64	26	53	52	33	35
Choral music	61	28	54	58	35	39
POPULAR						
Pop/rock	68	31	55	63	38	41
Jazz/blues	80	38	52	73	47	36
Folk	73	35	52	65	40	39
Country	41	18	56	33	19	43
Musicals	75	34	54	77	49	36
Stand-up comedy	79	36	54	75	46	39
OTHER						
Children's performances	52	23	56	48	28	42
Ethnic/heritage	67	35	51	59	35	41

Table 1 also shows that festival audiences have a wide range of performance interests during the regular season. Again, because of the high proportion of *no opinions*, (between 30% and 40% of the audience), caution must be exercised in interpreting the results. Taking the products column including *no opinions*, over a third of festival audiences indicate that they are interested in specific performance types for all types except two (country music and children's performances) during the regular season. In particular, over half say they are interested in drama (56%), comedy (59%) and symphonic music (50%).

2.20.2 GETTING TO FESTIVALS

Although a large majority of the festival audience are from the region where the festival is being held, a significant 26% report that they are, in fact, from another region. Many of those travelling from another region to a festival appear to make this trip on a regular basis, close to half (45%) report that they have attended the festival in other years. By comparison, among those living in the region, 62% report that they have attended the festival in previous years.

There appear to be a number of ways in which out-of-town audiences started coming to the festival at which they were surveyed. For just over one third (37%), the festival was the reason for coming to the region. For others (28%), they were already aware of the festival before deciding to visit the region, while for the remainder (23%) of the out-of-region audience, they became aware of the festival as a result of visiting the region.

Regional variations regarding out-of-town attendance indicates that in three regions, close to half the festival audience report that they do not live in the region where the festival is being held. These regions are: Atlantic Canada, excluding New Brunswick, Québec, outside of Montréal, and British Columbia, outside of Vancouver. In all, 51%, 49% and 48%, respectively, of those from these regions indicate that they did not live in the region where the festival was held. Caution is, however, advised in interpreting these results; a respondent may be using the term "region" very loosely. It may well be they simply take region to mean their immediate local community. The fact that most of those reporting that they live in another region travelled to the festival by car (79%), while 7% report by plane and 2% intercity bus, gives some evidence for the view that most festival audiences define region as meaning close to their immediate community.

In order to gain some insight into the extent to which audiences have in general travelled to attend a festival and would consider attending an out-of-town festival, two agree/disagree statements were included in the audience survey. Responses to these questions are found in Table 2.

It is clear from Table 2 that a substantial proportion of the audience surveyed have at least occasionally travelled outside of their community to attend a music, dance or theatre festival. Not unexpectedly, audiences surveyed at festivals are more likely to agree with the first statement, but even among non regular festival audiences, 40% agree that they occasionally have travelled to a festival, and, of this group, a fifth actually strongly agree with the statement. This suggests that 20% or so of the audiences surveyed may attend out-of-town festivals on a relatively regular basis.

It is also clear from Table 2, that both traditional and popular audiences appear to attend out-of-town festivals.

In addition to indicating that they occasionally travel outside their community to attend festivals, a substantial proportion of the audience also indicate an interest in finding out more information about out-of-town festivals. Of the total audience, 45% agree that they are interested in finding out more about out-of-town festivals. Interest is particularly strong among festival audiences.

Table 2

AUDIENCE: AGREE/DISAGREE STATEMENTS ABOUT FESTIVALS

	AGREE STRONGLY	AGREE SOMEWHAT	AGREE/ DISAGREE SLIGHTLY	DISAGREE STRONGLY	DISAGREE SOMEWHAT	NO OPINION*
	%	%	%	%	%	%
STATEMENTS						
YOU OCCASIONALLY TRAVEL OUTSIDE OF YOUR COMMUNITY TO ATTEND MUSIC, DANCE OR THEATRE FESTIVALS						
Total audience	23	18	26	10	18	4
Festival audience	31	22	26	7	12	2
Regular audience	22	18	27	11	19	4
FESTIVAL AUDIENCE						
Traditional audience	36	20	23	7	12	3
Popular audience	26	25	27	8	12	2
REGULAR AUDIENCE						
Traditional audience	22	18	26	11	19	4
Popular audience	19	19	29	11	18	4
YOU ARE INTERESTED IN FINDING OUT MORE ABOUT OUT OF TOWN MUSIC, DANCE, OR THEATRE FESTIVALS						
Total audience	23	22	30	9	12	5
Festival audience	28	25	29	7	8	3
Regular audience	22	21	31	9	13	5
FESTIVAL AUDIENCE						
Traditional audience	30	24	28	8	7	3
Popular audience	29	28	28	5	8	2
REGULAR AUDIENCE						
Traditional audience	22	22	30	9	13	5
Popular audience	21	20	32	10	13	5

2.20.3 Rating of Facilities

In general, festival audiences rated the various aspects of the performance facility quite similarly to regular audiences. This rating is shown in Table 3. There are, however, some significant variations. Festival audiences, while rating the cleanliness of the hall quite highly, rate this feature less positively than regular audiences. The same can be said for the view of the stage from the respondent's seat.

Some aspects of the facility are as poorly rated at festivals as at regular performances. In particular, seating comfort, washrooms, beverage services, are all given relatively poor marks. Much of this rating relates, in all probability, to the outdoors aspect of many festivals. Similarly, where respondents answered questions (and over half did not) regarding rating of restaurants, souvenir kiosks and workshop, these were also given relatively low marks, suggesting missed earned revenues opportunities.

Table 3

RATING OF FACILITIES

	FESTIVAL AUDIENCE			REGULAR AUDIENCE		
	EXCELLENT	GOOD	NO OPINION*	EXCELLENT	GOOD	NO OPINION*
	%	%	%	%	%	%
Quality of sound	44	45	24	42	46	15
Cleanliness of hall	40	46	24	49	43	10
View of stage	32	42	20	43	41	10
Building appearance	40	46	22	39	46	11
Comfort of seating	17	35	21	24	44	9
Washrooms	15	39	38	23	49	21
Beverage services	17	41	60	18	45	32
Restaurants	18	40	54	-	-	-
Souvenir kiosks	16	41	56	-	-	-
Workshops	24	41	68	-	-	-

* The percentages within the table have been recalculated to exclude the *no opinions*.

2.20.4 Motivation for Attending

There is no one reason that influences audiences to attend festivals, although substantial minorities do support specific motives as shown in Table 4. The two possible motivations that receive the most support are that of enjoyment of the festival atmosphere for which over a quarter of the total audience say this is their main reason for attending a festival, and of the wide range of choices available. Among festival audiences, and especially those attending a festival featuring Traditional performing arts types, the festival's atmosphere is cited more frequently as the main reason for attendance.

Among audiences at a Popular performance type festival, the wide range of choices available appears to be slightly more significant as a rationale for attendance than it is for Traditional performance type audiences and is, in fact, the most selected rationale for festival attendance.

Table 4
MAIN REASON FOR ATTENDING A FESTIVAL

				FESTIVAL AUDIENCE		REGULAR AUDIENCE	
	TOTAL AUDIENCE	FESTIVAL AUDIENCE	REGULAR AUDIENCE	TRAD-ITIONAL	POPULAR	TRAD-ITIONAL	POPULAR
	%	%	%	%	%	%	%
Enjoy atmosphere at festival	27	32	27	38	27	26	27
Wide range of choices available	22	25	21	21	33	22	20
To take a break from routine	16	13	17	13	15	16	18
Attend many shows in short time	12	11	12	10	6	12	12
Easily attend with family	8	9	8	9	13	7	11
Opportunity to concentrate on one type of performance	4	4	4	4	1	4	2
No opinion	10	6	11	5	5	13	9

2.20.5 Ticket Purchasing Issues

Almost all (88%) festival audiences bought single tickets for performances, rather than a pass. Even among those coming from another region to the festival, single tickets were the norm (89%).

The method used to purchase tickets for a festival performance is very similar to the way in which the audience overall purchased tickets for the performance at which they were surveyed. That is, a majority of ticket purchasing was done through the box office (62%), of which most (45%) was done in person. Only 21% of ticket purchasing was done through a ticket agency.

More use, however, was made of mail by festival-goers (8%). While it might be thought that those who reported that they came from out-of-town to a festival would have purchased their tickets differently from the local audience, this is not the case. As many used the box office (66%) as local audiences, although more reported purchasing through the box office by phone (23%). Out-of-towners, however, did not report any greater use of mail to order tickets. The fact that there are few differences between those from out of the region and the local audience in terms of ticket purchasing, suggests that many from out of the region purchased their tickets upon arrival at the festival.

There is some variation among single ticket and pass holders, in terms of their ticket purchasing. Pass holders are much more likely to report purchasing through the mail (18%), and report less use of the box office (46%).

The amount that festival audiences paid for a single ticket is slightly below that of audiences overall. The average amount paid, as shown in Table 5 is $21 compared to $23 for

audiences overall. It seems clear from this, and the distribution of responses by ticket price paid, that festival tickets are generally not cheaper than tickets for regular performances. In some instances, however, tickets might be cheaper, witness the 21% of the festival audience who reported that they paid less than $10 for their ticket. But overall, tickets appear to be similar in price to regular performances. In some cases they may be more expensive. Seven percent of festival audiences reported paying $50 or more for a ticket.

While ticket prices reported paid for festival performances do not seem that different from regular prices, there is a good deal of variation by type. Table 7 shows that theatre-comedy, choral, pop/rock, and children's performances are all well below the $21 average. At the same time, drama, symphonic music, chamber/soloists, folk, country and stand-up comedy have mean reported prices paid well above $21.

There is also some indication that festival audiences are prepared to pay more for a performance at a festival than they do at present. Table 4 shows that only 10% say they would pay no more than they paid for a ticket. Fully 83% say they are prepared to pay $2 more, while 63% are prepared to pay $4 more, and 45% $6 more.

As noted above, 12% of festival audiences indicate that they obtained a pass for the festival. The price paid for a pass, as Table 4 shows, varies greatly. The average price is $86, but nearly a third of pass holders indicate that they paid less than $25, while 37% paid $100 and over, another 29% report pass prices between $50 and $100.

Although a significant minority appear ready to pay $10 more for a ticket or 25% more for a pass, those indicating this willingness do not currently pay more nor less than others. In fact, the willingness to pay more is unrelated to how much was paid for a single ticket or a pass to the festival surveyed.

Finally, on ticket related issues, although few report having a pass for the festival they attended, over a third (35%) indicate that they would be very interested in purchasing a pass for the festival. A further 38% say they would be somewhat interested in obtaining a pass.

Table 5

TICKET PRICE ISSUES FESTIVAL AUDIENCE

	Festival Audience
AMOUNT PAID FOR SINGLE TICKET	
Less than $10	21
$10 - $14.99	17
$15 - $19.99	25
$20 - $24.99	9
$25 - $29.99	7
$30 - $39.99	11
$40 - $49.99	1
$50 or more	·7
No opinion	2
Mean amount	$21
WILLINGNESS TO PAY MORE FOR SINGLE TICKET	
$2 more	20
$4 more	18
$6 more	11
$8 more	6
$10 more	28
Not attend if any higher	10
No opinion	7
AMOUNT PAID FOR A PASS	
Less than $25	31
$25 - $49.99	2
$50 - $74.99	18
$75 - $99.99	11
$100 - $199	33
$200 or more	4
No opinion	2
Mean amount	$86
WILLINGNESS TO PAY MORE FOR A PASS	
5% more	10
10% more	26
15% more	5
20% more	11
25% more	31
Not attend if any higher	10
No opinion	6

2.20.6 DEMOGRAPHICS OF ATTENDANCE

As with most other audiences surveyed, festival audiences are disproportionately female. In all, 62% are female and 38% male. This is the same ratio of females to males found among regular performing arts audiences, as shown in Table 7.

While gender differences between Traditional and Popular festival audiences are not that great, there are great age differences. While 38% of Traditional festival audiences are 55 years and over, only 18% are in this age category among Popular festival audiences. When the age breakdown of festival audiences is compared with the regular audience, it is clear that differences between Traditional festival and regular performing arts audiences and their counterparts in the Popular performing arts are not great. The regular audience for the Traditional performing arts appears to be a little younger than the Traditional festival audience, 29% are below 35 years of age compared to 23% among the Traditional festival audience.

Among the Popular performing arts audience, the festival audience appears to be somewhat younger. To illustrate, while 38% of the Popular arts regular audience are below 35 years of age, 48% of this age group are among their festival counterparts.

One obvious conclusion to draw from the analysis by age is that, certainly among traditional audiences, festivals that were surveyed are not, in general, attracting a younger audience. This suggests that the role of festivals in building audiences may not be so much that they bring in the young, who will then be switched in time to regular Traditional types, but that they allow the core Traditional audience to broaden their experience with different Traditional types.[1]

Although young audiences may not be built through festivals for the Traditional performing arts, the fact that so many young people attend Popular performing arts festivals suggests that an audience may be being developed for this genre.

Attendance at children's performances is likely to be a special case where a Traditional performing arts audience among the young may be being built. As discussed in the section on children's performances in this chapter, exposure to the performing arts, as a child, does appear to be correlated with adult attendance. When life cycle variations are examined in relation to children's performances at festivals, it is clear that the exposure of children to the performing arts is taking place. A majority of the audiences were young parents, presumably with offspring in attendance.

Festival and regular audiences for both Traditional and Popular performance types are little different from each other and are relatively affluent. There are significant educational variations between the groups, although the variations are between Traditional and Popular performing arts audiences rather than between festival and regular audiences. In general, Traditional arts audiences at both festivals and regular performances tend to be very well educated, with close to half having at least one degree.

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1 It must be noted that only "paid for a performance" were surveyed. The age spread may well vary for the festival activities.

Once again, the lack of differentiation between Traditional audiences at festivals and regular performances points to the view that the two audiences are essentially the same types of people. This is less likely to be the case for Popular performance types.

The life cycle variations in audience type confirm the age variations noted above and reinforce the argument that, at least for Traditional types, festival and regular audiences are the same. In terms of describing this audience, Table 6 points out that for both festivals and regular Traditional performing arts types the audience consists of young childless singles and older people (either "empty nesters" or older singles).

Among Popular festival audiences Table 6 suggests that young, without children, singles are being attracted, likely as new audiences, as fully 38% made up the audience for Popular performances at festivals.

2.20.7 The General Public and Festivals

Consistent with the results obtained from the audience survey, a substantial plurality (40%) of the general public indicate that they attended a performing arts festival at some point since May 1990.

For those reporting attending a festival, Table 7 shows that with the exception of theatre, most of the festivals attended by any significant proportion of the population have been in the area of the Popular performing arts. Pop/rock, jazz/blues, folk, and stand-up-comedy all reveal in excess of a third of festival attenders saying they have attended these types of performances.

Among those reporting attending a festival, since May 1990, most (59%) have not travelled out of their community to the festival. However, 40% have travelled, and many (32%) report that they have travelled to another part of their province. The potential for festivals to be linked more with the tourism industry is evident.

Just as with the festival audience, Table 7 shows that those among the general public who report that they have attended a festival performance tend to give the enjoyable atmosphere of a festival as their most important reason for attending festivals. Well behind, in terms of the proportion of festival goers, is that of the chance to take a break from routine. Other options shown in Table 7 receive far less support as significant reasons for attendance.

Table 6

FESTIVAL: SOCIODEMOGRAPHIC VARIATIONS IN ATTENDANCE

	FESTIVAL AUDIENCE			REGULAR AUDIENCE		
	TOTAL FESTIVAL %	TRAD-TIONAL AUDIENCE %	POPULAR AUDIENCE %	TOTAL AUDIENCE %	TRADTIONAL AUDIENCE %	POPULAR AUDIENCE %
GENDER						
Male	38	38	43	38	38	39
Female	62	61	57	62	62	61
AGE						
16 - 24 years	11	8	17	13	13	15
25 - 34 years	23	15	31	18	16	23
35 - 44 years	23	19	19	19	17	23
45 - 54 years	17	20	16	16	17	15
55 - 64 years	14	19	13	16	17	12
65 years or more	12	19	5	17	20	12
HOUSEHOLD INCOME						
Less than $10,000	9	7	11	9	9	10
$10,000 - $19,999	10	10	12	10	9	11
$20,000 - $29,999	4	4	3	3	3	2
$30,000 - $39,999	13	12	14	13	13	14
$40,000 - $49,999	15	17	11	14	14	15
$50,000 - $59,999	12	13	11	12	12	12
$60,000 - $79,999	18	16	21	19	18	20
$80,000 or more	20	22	17	21	22	17
EDUCATION (highest level)						
Less than high school	3	3	4	3	3	4
High school	20	18	22	27	24	36
College	24	22	24	23	22	25
Bachelor's degree	24	28	30	26	27	22
Prof./Grad. degree	24	18	9	20	23	13
LIFE CYCLE STAGE						
Single,under 45, no children at home	28	21	38	24	23	26
Married, under 45, no children at home	9	7	13	10	9	12
Married, under 45, children present	16	11	12	14	11	18
Single parent	8	9	6	5	5	7
Married, 45 and +, children present	10	11	11	11	12	10
Married/45 and +, no children at home	15	21	12	22	23	18
Single, 45 and +, no children at home	13	21	8	14	16	9

Table 7

TYPES OF PERFORMANCES ATTENDED AT FESTIVALS IN THE LAST FIVE YEARS

	GENERAL PUBLIC ATTENDED FESTIVAL
TRADITIONAL PERFORMANCES	
Dance	25
Theatre	41
Classical music	18
Contemporary Classical Music	8
Choral Music/Opera	15
POPULAR PERFORMANCE	
Pop/Rock	42
Jazz/Blues	36
Folk	34
Comedy	37
Other performance	
Children's performance	23
Visual arts	18

Table 8

MEAN AMOUNT PAID FOR A SINGLE TICKET PERFORMANCE BY PERFORMANCE TYPE

	MEAN AMOUNT
TRADITIONAL PERFORMANCES	
Ballet	$22
Contemporary dance	$21
Theatre - Drama	$27
Theatre - Comedy	$11
Theatre - Avant -Garde	$20
Symphonic music	$32
Symphonic "Pops"	$22
Contemporary classical	$24
Chamber/Soloists	$26
Choral	$13
POPULAR PERFORMANCES	
Pop/Rock	$7
Jazz/Blues	$21
Folk	$27
Country and western	$35
Musicals	$19
Stand-up comedy	$26
OTHER PERFORMANCES	
Children's	$13
Ethnic/Heritage	$17
TOTAL	$21

Chapter 5

Visual Arts and Crafts in Canada

1 INTRODUCTION

1.1 Two Sources of Data

1.1.1 VISUAL ARTS SURVEY

The visual arts survey describes the characteristics, motivations and behaviour of purchasers or potential purchasers of visual arts and craft associated with various points of sale; these points of sale present Canadians with works of a particular aesthetic, a specific artist or era, and usually within a certain price range.

The definition of what art is, or is not, was left to the interpretation of individual visual arts respondents. These respondents were contacted, however, through specialized points of sale (commercial galleries, artist-run centres, professional artists Canada Council mailing lists), and thus, to a great extent, the works available through these points of sale effectively established the artistic terms of reference for the survey. These works of art, whether figurative or abstract, modern or old masters, share the common attribute of being viewed as art by society, through Canadian traditions and institutions.

Works sold at fairs, auction houses, craft shows and shopping centre galleries also formed part of this survey and contributed to its definition of art, although to a lesser extent as efforts to contact a wide variety of buyers by approaching such points of sale were not successful and cannot be examined to the same degree.

The selection of respondents for the visual arts survey is, therefore, closely connected to a specific definition of art, to the aesthetic of certain family of works of art.

1.1.2 GENERAL PUBLIC SURVEY

As with the visual arts survey, the general public survey did not include a definition of art except as implied by the questions, where aesthetically neutral and understandable terms were used. Respondents to this survey were selected at random and are therefore representative of the Canadian population. Thus, in the general public survey, Canadians express their behaviour, attitudes and intentions with regard to what they themselves define as art.

Variations are revealed among the consumers contacted in the visual arts survey through the various points of sale. There are, however, even greater differences between the average respondent to the visual arts survey and the various categories of consumers, potential consumers and non-consumers who responded to the general public survey.

In the analysis to follow, the results of the visual arts survey will be compared to those of the general public survey. Further, the reader will see how the acquisition of a work of art varies sharply, particularly on issues relating to amounts spent, between the art purchasers contacted through recognized artists, commercial galleries and artist-run centres, and purchasers in the general population. The implications of these findings in terms of marketing works of art and of the public's access to art, are also discussed.

1.2 Geography and Availability of Products

Any comments about the geographical distribution of product availability have to be made with certain caution, as the methods chosen do not insure statistical representativity from the points of sales sample. Nonetheless, the sample was built upon reliable sources (see Chapter 1 and Methodological Appendix), corresponds to the means and needs of the mandate, and constitutes a first listing of the points of sale of works of art created according to a model baed on Canadian art institutions.

As shown in Table 5.1, the inventoried points of sale for visual arts and crafts for the visual arts survey reflect uneven distribution across Canada.

The sale of art is clearly an urban phenomenon. The majority of commercial galleries and auction houses are found in the three major cites, and are most strongly represented in the provinces with the largest urban concentrations (Alberta, Ontario and Québec). The 13 commercial galleries in British Columbia form the exception to the rule. Similarly, more than half the professional artists contacted individually are concentrated in Toronto and Montréal, and less so in Vancouver.

Artist-run centres are more evenly distributed in each region of the country, possibly because the location of such organizations is not market driven – the sale of works of art is moreover a secondary mission – but related more to publicly funded services to the artistic community and the public.

Shopping centre galleries were selected for surveying in order to ensure adequate representation from each zone. The friends of museums, composed of individuals interested in the preservation and distribution of art through museums, were fairly evenly selected as well from among the 11 zones, but they are not, strictly speaking, points of sale.

Every craft media gallery identified by the researchers was included in the inventory; they differ from visual arts points of sale by their geographic distribution in that they vary only slightly in relation to zone population, and therefore they do not seem to be as concentrated in large urban as the visual arts points of sale.

Overall, as noted above, the availability of visual arts products and crafts varies greatly, according to established lists, from zone to zone. A comparison of the percentages of the adult population with the percentages of points of sale inventoried in each zone suggests that all provincial zones, particularly Ontario and Québec, have fewer points of sale per capita and that the 3 major cities have more. When professional artists are included, as indicated in Table 5.1, Toronto and Montréal have even more points of sales.

When the inventoried points of sale are compared, the presence of twice as many commercial galleries as artist-run centres, and a relative scarcity of professional craft galleries, appears clearly.

Table 5.1

Visual Arts - GEOGRAPHIC DISTRIBUTION
OF VISUAL ARTS AND CRAFTS POINTS OF SALE
FROM THE SAMPLING FRAME

Zones	BC	Alb	Sask	Man	Ont	Qué	NB	Atl	Vanc	Tor	Mtl	Total	% by
Population (16 years and over)	1 300 100	1 890 000	741 100	874 100	5 461 500	3 840 300	562 000	1 233 400	1 240 000	2 289 400	1 537 600	20970500	points
Categories	6%	9%	4%	4%	26%	18%	3%	6%	6%	11%	7%		of sale
Commercial galleries	13	6	2	2	5	2	1	3	22	24	21	101	12%
Artist-run centres	2	5	2	3	9	7	2	6	2	7	5	50	6%
Craft galleries	2	1	1	0	2	2	2	0	0	3	3	16	2%
Ass. of the Friends of Museums	3	3	2	1	9	3	1	2	2	5	3	34	4%
Shopping centre galleries	2	4	2	1	3	2	2	1	2	4	3	26	3%
Fairs	0	2	1	1	2	0	3	1	1	3	1	15	2%
Auctions	0	3	0	0	0	0	0	0	2	5	3	13	2%
Professional artists	26	33	16	20	70	43	7	21	45	137	171	589	70%
Total	**48**	**57**	**26**	**28**	**100**	**59**	**18**	**34**	**76**	**188**	**210**	**844**	
% of points of sale	6%	7%	3%	3%	12%	7%	2%	4%	9%	22%	25%		
Zones	BC	Alb	Sask	Man	Ont	Qué	NB	Atl	Vanc	Tor	Mtl		

Table 5.2 shows the number of questionnaires sent to intermediaries in each zone, the return response rates and the number of questionnaires received through the points of sale.

Unfortunately, the low response rates shown in Table 5.2 for the visual arts survey do not allow for a discussion of each zone. The response rates vary considerably from zone to zone. Five zones (Alberta, Ontario, Vancouver, Toronto, Montréal) generated more than 200 valid questionnaires each. The limited number of returns per zone, however, means that for most zones, a full and detailed analysis using cross-tabulations of results cannot be undertaken.

The fifth and sixth lines of the table show the respondents who, according to their postal code, live in a particular zone, independent of the zone of the intermediary who sent out the questionnaire. If, for example, a returned and valid questionnaire was sent out by a gallery in Toronto, it will appear on the third and fourth lines in the Toronto zone; if the respondent lives in Manitoba, it will appear on the fifth and sixth lines in that zone.

Thus, Table 5.2 indicates only small variations between the number of respondents from the zone of the point of sale that contacted them and their zone of residence. This may suggest that buyers of visual arts mainly tend to make their purchases from, or at least visit, the points of sale in their region. The high proportion of respondents contacted through professional artists (35%) probably contributes to establishing a greater sense of lack of movement among buyers, since the artists, with less visibility than other points of sale, tend to market in their immediate geographic vicinity.

A closer examination of the data shows that such movement is low and affects all zones. Table 5.3 indicates a clear distinction, on the one hand, between the three pairs of large city/province zones and the other provinces (the first group of zones show the three cities at slightly over 80% and the corresponding provinces at similar or lower levels) and on the other hand, most of the other zones (Atlantic excepted) which show a very high percentage of respondents residing in the same zone as the point of sale that contacted them.

Table 5.2

Visual Arts - SAMPLING FRAME AND RESPONSE RATE

Zones	BC	Alb	Sask	Man	Ont	Qué	NB	Atl	Vanc	Tor	Mtl	Total
Questionnaires mailed	965	960	406	368	1,308	716	408	534	1,453	2,732	2,153	12,003
Response rate	11%	21%	21%	10%	18%	13%	26%	19%	15%	9%	10%	14%
Respondants, by point of sale	111	201	84	38	238	95	107	99	220	259	220	1,672
	7%	12%	5%	2%	14%	6%	6%	6%	13%	15%	13%	
Respondents, by residence*	116	168	64	34	224	89	90	88	157	214	195	1,439
	8%	12%	4%	2%	16%	6%	6%	6%	11%	15%	14%	

* Based on postal code (233 respondents (14%) did not supply).

Table 5.3

Visual Arts – RESIDENCE OF RESPONDENTS AND POINTS OF SALE

Zones	BC	Alta	Sask	Man	Ont	Qué	NB	Atl	Vanc	Tor	Mtl
	%	%	%	%	%	%	%	%	%	%	%
% of respondents residing in zone and contacted by same zone point of sale	55	94	97	94	82	73	94	85	82	82	86

When respondents appear to travel to points of sale from out of their zone of residence, they are usually from the nearest zones, particularly if they are from one of the three major cities or their corresponding provincial zone.

- 13% of respondents living in Vancouver were referred by points of sale in British Columbia, and 41% of respondents living in British Columbia by points of sale in Vancouver.
- Toronto points of sale provided respondents from almost every zone, including 11% of the respondents living in Ontario, and 10% of Toronto respondents were contacted through Ontario points of sale.
- Montréal points of sale provided 20% of respondents from the rest of Québec and four other zones, and 11% of Montréal respondents were attained through Québec's points of sale.
- Respondents residing in the Atlantic zone were also contacted through points of sale in New Brunswick (7%) and three other zones.

This particular sample is small and should be examined with caution, particularly when broken down into many variables which provide small subsamples. That being said, it is surprising to find such a small variation between the points of sale and the places of residence. This suggests that even the respondents of this survey, rather than seek out a specific acquisition no matter what their geographic situation, by a large majority tend to buy locally and at one or more points of sale. Given the sociodemographics of this group, which suggests there might be fewer constraints to movement than for other segments of the population, this sedentariness is unexpected.

2 PURCHASERS

2.1 Sociodemographic Variables

2.1.1 VISUAL ARTS AND GENERAL PUBLIC SURVEYS

Respondents to the visual arts survey appear to be quite distinct from the general public respondents. Although they are somewhat older and are certainly more affluent, their dominant characteristic is their greater level of education, as illustrated in Table 5.4.

While half the general public survey respondents indicate they have high school education or less, 43% of those who answered the visual arts survey have a more than a bachelor's degree. This already sharp contrast is heightened by the high proportion of Bachelor's degrees among art buyers (30% of the visual arts purchasers as opposed to 12% of general public purchasers) while, among the general public, there appears to be a preponderance of respondents who have completed college level studies and/or part of a Bachelor's degree (24% as opposed to 15%). In the visual arts survey there were 15 times more respondents who held a professional degree, 7 times more Master's degree holders, and 6 times more Doctorates than there were among general public survey respondents.

In addition to higher levels of education, the visual arts sample is enriched by the presence of 21% of respondents who were born outside Canada, compared to 14% of those who answered the general public survey.

The visual arts survey respondents demonstrate a greater tendency to be active and in their middle years, rather than at the beginning or end of their lives.

Table 5.4

General Public and Visual Arts – SELECTED SOCIODEMOGRAPHIC VARIABLES

	GENERAL PUBLIC %	VISUAL ARTS %
GENDER		
Male	49	46
Female	51	54
EDUCATION: highest level		
Less than high school	20	1
Student	11	n/a
High school diploma	27	11
College	17	15
Some university	7	-
Bachelor's degree	12	30
Grad./prof degree	5	43
Professional degree	*1*	*15*
Masters degree	*3*	*22*
Doctorate degree	*1*	*6*
AGE		
16 - 24 years	15	2
25 - 34 years	27	17
35 - 44 years	23	32
45 - 54 years	14	26
55 - 64 years	11	15
65 years and over	10	9
HOUSEHOLD INCOME		
Less than $10,000	6	3
$10,000 - $19,999	14	9
$20,000 - $29,999	18	9
$30,000 - $39,999	16	8
$40,000 - $49,999	18	10
$50,000 - $59,999	11	9
$60,000 and over	17	50
$60,000 - $99,999	–	*23*
$100,000 - $124,999	–	*7*
$125,000- $149,999	–	*4*
$150,000 and over	–	*16*
LIFE CYCLE STAGE		
Single, no children at home, under 45 years	23	16
Married, no children at home, under 45 years	10	16
Married, children at home, under 45 years	30	16
Single parent	4	6
Married, children at home, 45 years and over	9	15
Married, no children at home, 45 years and over	15	21
Single, no children at home, 45 years and over	8	9

Weighted data is used for aggregate national general public data.

They are virtually unrepresented in the 25-and-under category, are less than average in the 25-to-35-year category, and are highly overrepresented in the 35-to-55-year category. Respondents aged 55 and over are present in proportions similar to that of the general public, with respondents aged 55 to 65 being slightly more numerous among purchasers of visual arts (15% versus 11%). The underrepresentation from the visual arts sample of those 35 and under is surprising when one considers that 55% of respondents who answered the visual arts survey say they bought their first piece of art before they were 25; this lesser presence of young purchasers in the visual arts sample suggests that they purchase their first work of art somewhere else than from the surveyed point of sales, perhaps from student artist friends.

The observations about age extend to a comparison of life situations. There is a higher percentage of respondents aged 45 and over, married with children at home and respondents aged 45 and over, married with no children at home, in the visual arts survey than in the general public survey (respectively, 15% as opposed to 9% and 21% versus 15%). There are fewer singles under 45 (16% compared to 23%) and an even smaller percentage of married respondents aged 45 and under with children at home (16% compared to 30%). There is one exception to the age related correspondences: married respondents under 45 with no children are overrepresented in the visual arts survey, probably because of the presence of two incomes in many such households and the greater latitude with regard to time and financial resources permitted by the absence of children.

The individuals reached through the visual arts points of sale are distinguished by other indicators that confirm the established and active situation of most respondents:

- 73% are home owners, and 31% have a summer home;
- 70% work full time, 31% are self-employed while only 12% work part time;
- 48% say they work more than 40 hours a week, while 17% say they work more than 51 hours a week;
- 54% are women however 6% say they are homemakers;
- fewer say they are studying (1%), are unemployed (2%) or are retired (8%).

Data on the spouses of respondents shows that, in similar proportions, a high percentage of spouses work full time; few respondents are retired, students or unemployed.

The high proportion of middle-aged respondents and the clear presence, in the survey, of a substantial majority belonging to a two-income household, explain the high household incomes. As is apparent in Table 5.4, household incomes of more than half visual arts survey respondents are greater than $60,000, as opposed to 16% among the general public. One art buyer in six (16%) has a household income of over $150,000.

2.1.2 PURCHASERS AND INTENDED PURCHASERS FROM THE GENERAL PUBLIC SURVEY

As well as the sociodemographic information, the general public survey allows for the identification of characteristics that define buyers and potential buyers of works of art:

- 34% say they had thought about buying a work of art in the previous year;
- 20% say they bought a work of art within the five previous years and 24% within the previous year;
- 16% say it is very probable that they will buy a work of art in the next two years.

Table 5.5 examines the differences between the sociodemographic profiles according to various reported behaviour and intentions responses by comparing the average general public respondents to the visual arts survey respondents.

2.1.2.1 Thoughts About Purchasing

The sociodemographic characteristics of respondents who thought about buying a work of art in the previous year are, with three exceptions, similar to those of the average general public respondent:

- Somewhat more respondents have attended university and obtained degrees;
- There are slightly more respondents in the under 45 age category;
- Respondents reporting an annual income higher than $60,000 are more numerous (7%); consequently, there is a lower percentage of respondents with lower incomes.

Neither the family situation nor the age spread differ.

Table 5.5

General Public and Visual Arts
SELECTED DEMOGRAPHIC VARIABLES OF VISUAL ARTS AND CRAFTS PURCHASING

	GENERAL PUBLIC* (average)	GENERAL PUBLIC CONTEMPLATED PURCHASE LAST YEAR	GENERAL PUBLIC VERY LIKELY TO PURCHASE DURING NEXT TWO YEARS	GENERAL PUBLIC PURCHASED IN LAST 5 YEARS	GENERAL PUBLIC PURCHASED LAST YEAR	VISUAL ARTS (average)
	%	%	%	%	%	%
EDUCATION: highest level						
Less than high school	18	12	7	12	9	1
Student	12	13	9	12	13	n/a
High school diploma	27	24	22	24	22	11
College diploma	17	19	21	18	19	15
Some university	8	8	13	9	9	-
Bachelor's degree	13	16	18	16	19	30
Grad./prof. degree	6	18	10	9	9	43
Professional degree	*2*	*4*	*5*	*3*	*3*	*15*
Master's degree	*3*	-	*3*	*5*	*5*	*22*
Doctorate degree	*1*	*2*	*2*	*1*	*1*	*6*
AGE						
16 - 24 years	16	18	11	15	16	2
25 - 34 years	26	26	30	26	26	17
35 - 44 years	24	27	31	26	27	32
45 - 54 years	14	15	13	15	15	26
55 - 64 years	10	9	10	11	10	15
65 years and over	10	5	4	8	6	9
HOUSEHOLD INCOME						
Less than $10,000	7	4	1	5	5	3
$10,000 - $19,999	14	10	8	11	10	9
$20,000 - $29,999	18	15	12	16	14	9
$30,000 - $39,999	17	16	16	15	15	8
$40,000 - $49,999	18	19	17	18	18	10
$50,000 - $59,999	11	12	12	12	14	9
$60,000 and over	16	23	33	23	26	50
$60,000 - $99,999	–	-	-	-	-	*23*
$100 000 - $124,999	–	-	-	-	-	*7*
$125 000 - $149,999	–	-	-	-	-	*4*
$150,000 and over	–	-	-	-	-	*16*
LIFE CYCLE STAGE						
Single, no children at home, under 45 years	24	26	21	24	24	16
Married, no children at home, under 45 years	10	12	16	11	13	16
Married, children at home, under 45 years	29	28	32	29	28	16
Single parent	4	5	5	5	6	6
Married, children at home, over 45 years	9	10	9	10	9	15
Married, no children at home, over 45 years	15	12	12	16	14	21
Single, no children at home, over 45 years	8	7	5	7	6	9
GENDER						
Male	49	48	46	45	43	46
Female	51	51	52	54	56	54

* Non-weighted data is used for cross tabulations.

2.1.2.2 Purchased Within 1 or 5 Years

The general public respondents who reported a purchase in recent years differ little from the national average of all purchasers from the same survey. The family situation and ages remain fairly similar, while the percentage of women increases by 3% and 5% respectively. Among respondents who have bought art in the past five years, we see a similar and very slight increase in the proportions of higher incomes and university education. Respondents who say they have bought art in the past year are a few percentage points higher in these two areas. The profiles of general public purchaser types, as Table 5.5 makes clear, are very different from the average visual arts survey respondents.

2.1.2.3 Probable Purchase

Respondents who say that they will most likely buy a work of art in the next two years have a more distinct profile, situating them mid-way between the general public respondents and those who answered the visual arts survey. These people who intend to purchase:

- Have fewer very low household incomes in all categories.
- Have double the general public average and three fifths of the visual arts average for incomes above $60,000.
- Education increases slightly in terms of years in university, and there is a slight increase among those with university education in comparison to the general public, though they still fall well behind the results for the visual arts survey.
- The age grid indicates an underrepresentation in the 25-to-44-year category in comparison to the general public, while there is greater representation in this age category than there is in the visual arts survey (particularly among the 25 to 34-year-olds). There are fewer persons aged 55 and over than in the visual arts sample.
- For the first time, as with age, family situation changes in this table, demonstrating a slightly higher proportion than the average general public in the 45-and-under married without children (+6%) and with children (+3%) categories.

2.1.3 Observations

Art buyers in these various subgroups are not radically different, being present in significant proportions in most strata in each sociodemographic category. If, however, one looks at the data on the visual arts survey respondents, the age, education and life cycle variations suggest that probable buyers are waiting in the wings, that they are establishing their family life and consolidating their homes. This situation, while it is not necessarily conducive to buying many works of art, nevertheless establishes a favourable environment for limited purchases.

One would have expected to find data showing that the self-reported buyers in the general public survey would have sociodemographic characteristics comparable to those of the respondents contacted through the visual arts and crafts points of sale. On the con-

trary, the results indicate that it is the general public respondents who say they are planning a purchase within the next two years who most resemble the visual arts survey respondents.

2.2 Psychographics and Purchases

In the general public survey, the distribution of intentions to purchase and actual behaviour by psychographic type tends to corroborate preceding observations. The two types who are most positive about the arts, the Devoted and Believers, are among those who say they will likely buy a work within the next two years almost twice as frequently after than in the general population as a whole. The groups who are less interested in the arts (Uninvolved, Carefree Pop-Rockers, and the Tuned Out) are underrepresented. To a lesser extent, the same over and underrepresentations can be observed in the composition of groups who have said they have thought about or have purchased a work in the preceding year. Those who have purchased within the past five years are the closest to the general public average.

Table 5.6

General Public - COMPARED PSYCHOGRAPHIC DISTRIBUTION AND VISUAL ARTS AND CRAFTS PURCHASING

	GENERAL PUBLIC (average)	CONTEMPLATED PURCHASE LAST YEAR	GENERAL PUBLIC PURCHASED IN LAST 5 YEARS	GENERAL PUBLIC PURCHASED LAST YEAR	VERY LIKELY TO PURCHASE DURING NEXT TWO YEARS
	%	%	%	%	%
Devoted	8	13	11	13	16
Believers	17	24	20	28	31
Practitioners	14	11	14	15	11
Conditionals	18	20	20	16	17
Uncommitted	14	17	14	12	12
Uninvolved	17	10	13	8	8
Carefree Pop-Rockers	6	3	4	3	3
Tuned Out	6	3	6	3	2

See Chapter 2 for definitions of psychographic types.

The Practitioners are present in the group that reported purchasing behaviour in the past one or five years in proportions that match the average for the general public, but register lower percentages when it comes to their purchase intentions. The proportion of those who are Uncommitted fluctuates only slightly.

The overall implication of these results is that a positive attitude toward the arts translates into frequent attendance at performances but also into active art purchasing behaviour.

2.3 Art and Young People

Seven in ten visual arts survey respondents had taken visual arts courses in school, in painting (47% of respondents), drawing (44%), sculpture (18%) and pottery (13%) before reaching the age of 16.

More than half the respondents had taken courses in an extra-curricular context related to the visual arts. The main courses taken were painting (27%), drawing (23%) and photography (12%). A large majority of respondents indicate these courses were very pleasant (44%) or somewhat pleasant (24%).

The fact that the majority of respondents took courses in their childhood should not override the significant minorities among art and craft buyers who say they never took art courses in school (31%) or outside of school (47%). There is a correlation between childhood experience and adult behaviour, but it is not automatic, which suggests that one may discover the visual arts and become a buyer without having been exposed to art in childhood, or at least, without remembering such exposure.

The same reasoning applies in Table 5.7, which shows that, respectively, 50% and 36% of respondents never or rarely visited art galleries and museums in their childhood.

Table 5.7 also shows differences between the visual arts sample and the general public. Asked whether they visited one or more art galleries regularly during their childhood, 14% of Canadians answered yes, while the visual arts survey respondents, being offered a more detailed choice of answers, said by a comparable percentage (15%) they went frequently, and a further 33% indicated that they went occasionally.

Table 5.8 shows the data for the general public survey with regard to reported behaviour, purchasing intention, and the psychographic types of respondents, according to various childhood behaviour related to the visual arts. It suggests a correlation between the incidence of artistic experiences in childhood and similar behaviour as an adult.

Table 5.7

Visual Arts and General Public
CHILDHOOD VISUAL ARTS EXPERIENCES

	Visual Arts %	General Public %
Visited art galleries		
Regularly	n/a	14%
Frequently	15	n/a
Occasionally	33	n/a
Rarely	28	n/a
Never	22	n/a
No opinion	2	n/a
Visited museums		
Regularly	n/a	35%
Frequently	21	n/a
Occasionally	42	n/a
Rarely	25	n/a
Never	11	n/a
No opinion	2	n/a

Table 5.8

General Public - CHILDHOOD EXPERIENCES IN RELATION TO BEHAVIOUR AND INTENTION TOWARDS VISUAL ARTS AND CRAFTS PURCHASING

	Average	Visited art galleries 2 or more times in last 12 months	Visited museums 2 or more times in last 12 months	Parents' interest in visual arts very/somewhat interested	Parents' interest in visual arts not too/not at all interested	Parents purchased paintings frequently/occasionally
Devoted	8	17	15	11	7	12
Believers	17	33	24	24	14	30
Practitioners	14	13	12	15	13	14
Conditionals	18	16	18	16	17	17
Uncommitted	14	9	12	14	17	12
Uninvolved	17	8	11	10	19	9
Carefree Pop-Rockers	6	2	3	4	6	3
Tuned Out	6	3	5	4	8	4
PURCHASING BEHAVIOUR AND INTENTION						
Purchased in the last year and						
Very likely to purchase in the next two years	9	21	14	12	7	17
Unlikely to purchase in the next two years	15	18	17	14	14	17
Purchased in last five years and						
Very likely to purchase in the next two years	4	9	6	5	4	8
Unlikely to purchase in the next two years	16	19	20	20	14	15
Never purchased and						
Very likely to purchase in the next two years	3	5	4	5	3	5
Unlikely to purchase in the next two years	40	27	36	38	45	33
Not asked	12	2	3	6	13	5

Non-weighted data is used for cross-tabulations for its more consistent sample.. Average differs slightly from the weighted average used in Chapter 2 for the category distribution in the Canadian population.

A greater proportion of respondents who regularly visited exhibitions during their childhood report they have bought a work of art in the past one or five years and say they intend to buy one within the next two years. Further, buyers and potential buyers are systematically more numerous among those who visited galleries in their childhood than among respondents of the same age who visited museums regularly.

Parents' interest in the arts is also an important factor in purchasing or intentions to purchase. The percentage of respondents who recall that their parents were very or somewhat interested in the arts is higher than the general public average, and higher than the subgroup of respondents who regularly visited museums when they were young. Still, the highest proportions of reported purchasers are among respondents who regularly visited art galleries when they were young, which suggests that visiting a place where artwork could be bought may have a greater influence than, on the one hand, visits to exhibitions where works were not for sale, and on the other, the memory of parents' positive attitude toward art. This suggestion, as convenient as it may appear

in this survey, must however be tempered by the possibility that some respondents, mainly among the anglophones, remembered visits to museum-like institutions of similar name (public galleries).

When parents had little or no interest in the arts, this appears to be connected to behaviour and purchasing intentions that are lower than average: almost half the respondents in this subgroup say they have never bought a work of art and have no intention of doing so in the next two years.

Respondents who remember their parents making frequent or occasional purchases of art are the largest group to report a purchase or an intention to purchase within the next two years. They are also least numerous in declaring no intention to purchase.

This observation, along with that made above on the incidence of visits to art galleries in childhood, suggests that contemplation of a work of art - in a museum for example - and possessing a work of art may be different experiences for certain individuals, and could constitute behaviour that is motivated by different factors. Thus, a young person's exposure to a work of art may help develop his or her interest in art, but the desire to buy and possess art seems more influenced by seeing art bought in a gallery, or, even better, seeing parents buy art.

The variations by psychographic type for each childhood experience are also shown in Table 5.8. There is an obvious overrepresentation of Devoted and Believers, and an underrepresentation of Carefree Pop-Rockers and the Tuned Out for all who reported visits, an interest, or purchasing behaviour on the part of parents. In the groups whose parents had little or no interest in the visual arts, the phenomenon is inverse.

2.4 Leisure Time

Given their sociodemographic profile, and particularly their high level of education, the nature of leisure activities as reported by visual arts survey respondents will come as no surprise.

Cultural activities such as reading and listening to recorded music top the list of activities, as they do for the general public, but more visual arts survey respondents say they engage in these at home activities. Watching rented videos is also high on the list of activities, but less so than for the general public.

Other home related activities are very important for visual arts survey respondents, and in a greater proportion than for the general public: having guests over (93% versus 86%) and gardening (71%, 56%). Almost half the sample also say they practice an activity related to the visual arts or crafts, which could also be done at home, at least in part.

Although in substantially lesser proportion, the visual arts survey respondents also favour out of the home activities. In doing so, the respondents to the visual arts survey seem drawn to activities that allow for a meditative approach, and contemplation of, or interaction with their environment.

Table 5.9
Visual Arts and General Public
LEISURE ACTIVITIES OF THE RESPONDENTS

	VISUAL ARTS	GENERAL PUBLIC
	%	%
Read a book	96	85
Entertained at home	93	86
Listened to records/tapes/compact discs at home	92	88
Bought records/tapes/compact discs	80	72
Viewed a rented video at home	75	87
Gardened (in season)	71	56
Worked as a volunteer	60	37
Attended an amateur/student performance of some type	49	43
Practised a discipline related to visual arts/crafts for pleasure	48	n/a
Photographed (as a hobby)	46	34
Camped/hiked	45	47
Recreational biking	41	43
Skied cross-country or downhill (in season)	39	28
Practised water sports	34	n/a
Visited an amusement/theme park	28	48
Whale watching/bird watching	26	14
Took part in a live performance of some type	24	24
Played a racquet sport	23	18
Played a musical instrument	21	22
Played pool/darts/bowling	19	46
Played golf (in season)	17	23
Fished/hunted	17	31
Sang in a choir	4	6

This trend appears even clearer when the interests of visual arts survey respondents are compared with the general public respondents'. Almost half the visual arts sample go camping or hiking, which is also true of the general public, while photography (46% versus 34%), cycling (43%, 41%), downhill skiing (39%, 28%), bird and whale watching (26%, 14%) are activities in which more visual arts survey respondents engage.

While cycling and skiing certainly require significant physical involvement, other somewhat comparable activities are of less interest for visual arts survey respondents: only small minorities are interested in hunting, racquet sports, billiards and amusement parks. Golf is also less frequently played (17% as opposed to 23%). Most of these activities require a lot of walking, and the lesser interest may be due to the higher average age in the visual arts sample than in the general public sample. Competitiveness is also a component of these less practised activities, which could

support the suggestion of a more inner-oriented and contemplative attitude for the visual arts survey respondents.

Volunteer activities, which among other things usually involve leaving the house, receive a much higher rating (60%) from the visual arts survey respondents than from the general public (37%).

The three leisure activities related to the performing arts are practised by less than one quarter of the visual arts survey respondents. On the other hand, attendance at professional shows, as is indicated in Table 5.10, is higher than for the general public for all types of products except pop/rock and country and western shows.

Visual arts survey respondents are particularly likely to attend traditional performing arts, in higher proportions than the general public. Theatre, symphonic music, chamber music, contemporary dance, opera and ballet are of particular interest.

While 48% of respondents of the visual arts survey say they practise a leisure activity related to the visual arts or crafts (Table 5.7), only 21% say they have taken a course in the same area, with half the courses being in painting (Table 5.11).

Visits to exhibitions have an important place in the leisure activities of the visual arts survey respondents. Table 5.12 demonstrates that respondents visit commercial galleries most often - only 15% had no opinion, which suggests an overall 85% of respondents visit at least once a year. Of those attending, 71% say they went more than 4 times in the previous 12 months.

Table 5.10
Visual Arts–
PERFORMANCE ATTENDANCE DURING THE LAST SIX MONTHS

	GENERAL PUBLIC	VISUAL ARTS
	%	%
Ballet	7	24
Contemporary dance	7	26
Theatre: drama	24	56
Theatre: comedy	26	35
Theatre: avant-garde	6	27
Symphonic music	12	38
Symphonic pop concerts	9	10
Contemporary classical music	-	18
Chamber music and classical soloists	6	25
Opera	5	23
Choral music	10	16
Pop/rock	27	21
Musicals	20	30
Humour	18	14
Jazz/blues	14	27
Folk music	9	15
Country and western	15	8
Children's music, theatre or dance	16	17
Ethnic and heritage dance/music	14	18

The three types of museums are also visited by large majorities of respondents that visited them at least once a year. Visits were also more frequent than among the general public respondents. However, galleries and artist-run centres are more often visited. The lower rates of attendance and high level of *no opinion* in the provincial gallery category is surprising when one compares this exhibition space to that of the two other museum institutions.

The reason for this may be that not every province has this type of institution, and that they are not always easily identifiable as provincial galleries.

Table 5.11
Visual Arts–
COURSES IN VISUAL ARTS

	Respondents	%
Painting	159	10
Drawing	49	3
Textile arts: tapestry weaving	43	3
Photography	39	2
Sculpture	27	2
Ceramics	26	2
Metalwork	10	1
Glasswork	4	0
Leather	1	0
No courses	1,191	71
No opinion	123	7

Respondents to the visual arts survey seem ready to visit exhibitions outside of galleries, artists' centres and institutions, since only 29% of the respondents express no opinion about these places and 40% of those visiting say they have gone more than 4 times in the past 12 months.

Table 5.12
Visual Arts – VISITS TO EXHIBITIONS DURING THE LAST 12 MONTHS

	ONCE	TWICE	THREE TIMES	FOUR OR MORE TIMES	NO OPINION
		%	%	%	% %
Commercial gallery	8	11	13	71	15
Municipal/university gallery	19	19	16	48	25
National/provincial/regional museum	28	23	14	34	29
Art exhibition other than in a museum or art gallery	23	24	14	40	29
Craft show/fair	36	30	13	21	33
Artist-run centres	21	18	13	48	39
Provincial gallery	27	22	15	37	40

Percentages have been recalculated to exclude the *No opinions*.

3 PRODUCTS

A useful and effective segmentation of the visual arts market developed for this research is based on the aesthetics and values that the works have in the eyes of the buyer. The working assumption used in this research is that this segmentation could be accomplished by working with a typology of points of sale and not with a typology of products, as in the case of the performing arts. Each point of sale conveys certain values and a certain aesthetic that the consumer finds presented in a relatively homogenous and constant fashion in the inventory provided, even if this inventory consists of works from diverse media (paintings, drawings, sculpture, etc.) The consumer may be likely to adopt one or several points of sale that have works that appeal to him or her, rather than look for works of interest among all the paintings or textile art available on the market.

In other words, a gallery that specializes in the works of European masters and an artist-run centre which focuses on contemporary art will both be characterized by an aesthetic coherence rather than a coherence of product type.

The working assumption developed in this section focuses on visual arts products, beginning with a description of levels of interest, mentions of purchases and the prices paid for various types of products, followed by the examination of the sociodemographic features of respondents who said they had purchased one or more visual arts works.

3.1 Interest in Works of Art and Crafts

A large majority (81%) of visual arts survey respondents are very interested in painting, as is apparent in Table 5.13. Original drawings are of interest to 64% of respondents and prints and sculptures are evenly of interest at 51% and 49%. These four types of products rarely receive a mention of no interest. Three out of ten respondents are very interested in photographs, while 9% say they are not at all interested in this type of product. One respondent in four is very interested in textile art, while 13% of respondents are not at all interested. Installations and videographic works garner a low level of interest, with 21% and 13% respectively; however, it should be noted that such types of work are seldom actually for sale.

The general public survey parallels these results in terms of the order of interest levels, the exception being photographs (27% being very interested) which go from fifth to second. For all types of products, however, the rate of "very interested" is lower than for respondents to the visual arts survey; similarly, the rates of non-interest are higher, except for photographic works.

The strong interest in crafts shown by respondents to the general public survey is worth mentioning, as it is higher than for any other type of product except paintings.

The important place given to works of art in general by visual arts survey respondents, beyond the relative popularity of the types of products, is demonstrated in Table 5.13. While general public survey respondents are somewhat less interested, their level of interest is nonetheless high, particularly given the marked difference between the demographics of respondents in the two samples.

Table 5.13

Visual Arts and General Public
INTEREST IN SPECIFIC TYPES OF PRODUCT

	VISUAL ARTS %		GENERAL PUBLIC %	
	Very interested	Not at all interested	Very interested	Not at all interested
Original paintings	81	1	34	8
Original drawings	64	1	26	9
Original prints	51	3	25	10
Sculptures	49	2	17	13
Fine art photography	32	9	27	7
Original textile artwork	24	13	11	20
Installations	21	24	n/a	n/a
Video and other media art	13	28	n/a	n/a
Ethnic arts and crafts	n/a	n/a	15	14
Fine craft works	n/a	n/a	30	9

The question of interest in crafts was posed to visual arts survey respondents by following a typology based on various media for this kind of product, as shown in Table 5.14. Though generally positive, the visual arts survey respondents had a rather lukewarm interest for these types of works, compared to their support for other types of art. Twenty-seven percent (27%) said they were very interested. Those who were not at all interested fluctuated between 18% and 39%, suggesting there is resistance to craft products on the part of visual arts survey respondents.[1]

Without concluding that this reflects a general lack of interest in crafts, one could hypothesize that a good proportion of art buyers are less receptive to craft products, while, as was shown in the previous table, the general public respondents tend to be more interested in crafts than they are in other types of art work.

Table 5.14
VisualArts – INTEREST IN CRAFT WORKS

	JEWELLERY %	CERAMICS %	GLASSWORK %	WOODWORK %	TEXTILES %	METALWORK %	LEATHER %
Very interested	27	26	21	16	13	10	5
Somewhat interested	33	37	34	34	25	25	14
Not too interested	17	19	24	26	28	33	35
Not at all interested	18	14	15	18	28	24	39
No opinion	5	4	5	6	7	7	7

1 It should be noted, however, that the visual arts sample is composed mainly of respondents contacted by art points of sale, and that the returns from craft points of sale, where one would expect support for these products, were modest.

Some evidence for interest in craft works among visual arts survey respondents comes from the fact that three types of crafts have a combined rate of interest (very interested and interested) higher than 50%, and high "very interested" answers from the visual arts survey respondents: jewellery (27%), ceramics (26%) and glasswork (21%), which are close to the 30% of interest for craft products received in the general public survey.

Given the interest among the general public in craft works, it seems likely that the development of the craft market would seem to lie more with the general public than with current visual arts purchasers. However, certain products for specific niche markets among visuals arts purchasers may also bear potential.

3.2 Reported Purchase of Works of Art

An order of preferences for various types of artwork was developed from the general public among visual arts respondents concerning purchases of artwork over the past five years (see Table 5.15). Painting tops the list, as six out of ten visual arts survey respondents say they have made the purchase of a painting in the past five years, followed by purchases of prints (44%). One in three respondents has bought original drawings and sculpture. Photographs and textile works form the next group, at 19% and 14%. Installations and videographic works close the list with purchase declarations of 2% and 1%, but again this should be viewed in the context of their relative unavailability for purchase.

Declarations concerning purchasing over the past year are, not unexpectedly, one third to one half lower than over the five year period, although the order of types of products does not change between the two time periods.

The preferences expressed by the visual arts survey respondents (Table 5.13) and the mention of actual purchases (Table 5.15) appear in the same order, with one exception: original drawings, second in preference, are preceded by prints in actual purchasing.

The responses to the general public survey reveal notable differences between the two surveys. Interest in crafts remains steady and tends, when reported purchases are considered, to be rated higher than any other category of visual arts: more than a third of the population say they have acquired a work of fine craft within the past five years and a quarter mention the purchase of paintings, photographs and prints; a fifth mention buying crafts and ethnic art.

However, it should be noted that 23% of the visual arts survey respondents did not answer this question. This suggests that nearly a quarter of respondents referred by points of sale and organizations interested in the visual arts, have not bought any art in the past five years. Fully 41% state they have not bought in the past year.

Table 5.15

Visual Arts and General Public – WORKS OF ART PURCHASED

	IN LAST 5 YEARS		IN LAST YEAR	
	Visual arts %	General public %	Visual arts %	General public %
Original paintings	58	25	39	16
Original drawings	32	13	17	8
Original prints	44	24	27	20
Sculptures	32	14	19	11
Original textile artwork	14	15	6	11
Fine art photography	19	25	11	24
Video and other media art	2	n/a	2	n/a
Installations	1	n/a	1	n/a
Fine craft works	n/a	36	n/a	39
Ethnic arts and crafts	n/a	22	n/a	21
No opinion	23	11	41	0
Respondents	1,672	4,844	1,672	2,660

Table 5.16 is a variant of the preceding table. It examines, for visual arts survey respondents, the breakdown of their acquisitions by eliminating the *no opinion* answers. This table thereby confirms the dominance of painting and the three other types of traditional products: in the past five years, three out four purchaser-respondents say they have acquired a painting, almost six out of ten a print, four out of ten a drawing or a sculpture, one quarter photographs, and a fifth textile works.

Table 5.16

Visual Arts – DISTRIBUTION OF WORKS PURCHASED BY TYPE OF WORK

	LAST 5 YEARS %	LAST YEAR %
Original paintings	75	65
Original prints	57	45
Original drawings	42	29
Sculptures	41	32
Fine art photography	25	18
Original textile artwork	18	11
Video and other media art	3	3
Installations	1	2
Respondents citing purchase	1,283	994
No opinion	389	678
Total respondents	1,672	1,672

The figures for *No opinion* are not included in the percentages

The breakdown of reported purchasing behaviour over the past year reflects these same proportions. Table 5.16 also shows that in the same sample, the number of respondents reporting a purchase within the past five years only decreases by a fifth for those purchasing within the past year, suggesting there is a sustained rhythm of buying.

When comparing the reported purchasing of the visual arts survey respondents with the interest expressed in these types of products, purchase and interest tend to follow each other. Not surprisingly, the visual arts survey respondent buys what he or she is interested in. This parallel is less evident for the general population when the same comparison is made between interest and reported purchasing: paintings and drawings tend to decrease, and crafts, photographs and prints increase relative to interest. At the same time, the general population's reported purchasing is much lower than the rates of acquisition for visual arts survey respondents. They represent, however, a great number of people: 16% of the Canadian population over 16 years of age means 3,000,000 individuals, a significant number, who say they have bought a painting in the past year.

In reviewing the level of interest and reported purchasing behaviour on the part of general public survey respondents, a caution is required. Given the responses of the discussion groups held before the field surveys, one may ask whether some of the population interpreted *photographs, prints* and the meaning of *original work* in terms of the objects available to them in their environment, rather than according to the canon of the traditional visual arts (one-of-a-kind work, technical mastery, aesthetic concerns, recognition of quality by peers and critics). It is possible that large numbers of people acquire art, but that does not necessarily mean that the art they buy is one-of-a-kind work nor that the work is produced in the same way as works such as those sold in art galleries and artist-run centres. For many respondents, photographs and prints may be associated with studio photographs (rose on a grand piano, nature scenes, deluxe cars) or posters (films, shows, graphic design), which, whether laminated or framed, are freely available outside of the traditionally understood visual arts marketing network.

The following observations can be made:

- More than a quarter of the Canadian population expresses interest in traditional visual arts forms.
- These same respondents indicate purchasing in lower proportions than for traditional types and prefer types of products that may not be one-of-a-kind works of art produced according to the standards of the visual arts world.
- Ten to twenty-five percent of Canadians say they have, in the past year, bought, and therefore paid to possess, various types of objects that are either traditional works of art or are other objects endowed with aesthetic, affective or symbolic characteristics serving the same ends for these respondents.

In short, there appears to be similar acquisition and possession behaviour between the visual arts and general public surveys respondents, although the general public's level of acquisition is well below that of the visual arts respondents, as well as possibly proceeding from a different interpretation of what is a work of art.

3.3 Value of the Works Acquired

The purchase prices paid as provided by visual arts survey respondents, not surprisingly, are significantly higher than prices paid by the general population. Fourteen percent (14%) of acquisitions fell into the three categories worth more than $5,000, while less than 0.5% of general public respondents reported paying a similar price. Twenty-four percent (24%) of acquisitions by the visual arts survey respondents cost from $1,000 to $4,999, while only 2% of the general public say they made purchases at these prices.

Nevertheless, works bought for less than $1,000 represent a clear majority (62%) in the visual arts survey. Half of respondents reported that acquisitions cost between $100 and $999. Such a result in the visual arts sample challenges the widely-held perception that art is expensive, or even out of reach. It seems that in addition to the occurrence of high priced sales of artwork, the majority of transactions by visual arts survey respondents involve more modest sums and are similar to the occasional expenses incurred by most households (furniture, vacations, household appliances).

In 54% of all reported acquisitions by general public respondents, the paintings, photographs, prints, drawings, sculptures and textile works cost less than $100, and for a fifth of the purchases, less than $25. A third of respondents had spent from $100 to $499. Only 7% of the population had spent more than $500 for a work of art.

The importance of the small percentage of respondents who say they spent $500 to $999 (5%) or from $1,000 to $4,999 (2%) on a work of art should not be underestimated. Translated into numbers, and given the median value for the category, the 5% represents, nationally, more than a million people who would have collectively spent $730,000,000 for their latest purchase. The 2% group represents 400,000 people who would have collectively spent more than a billion dollars. Such calculations cannot be taken too literally because it is not possible to determine the time period covering such transactions, and the reported price paid and frequency of purchases may possibly be exaggerated.

The calculations do not take into account the breakdown in the general population of the dominant socio-demographic variables for respondents who say they made a purchase.

Nonetheless, it should be recognized that these figures, even if they only measure the number of people who believe they are capable of or wish to make such purchases, represent a significant volume.

The results shown in Table 5.17 echo the dichotomy of the previous section: the visual arts and general public[1] respondents have very divergent views on the value of the symbolic objects they call art and say they have purchased. However, the price ranges from $100 to $999 seem to provide a meeting ground between the two surveys, and one that is favourable to the development of the arts market.[2]

Table 5.17

Visual Arts and General Public
COMPARATIVE VALUE OF ACQUIRED WORKS

	VISUAL ARTS	GENERAL PUBLIC
	Three most recent purchases	Last acquisition
	%	%
Less than $25	*N/A*	*20*
$25 to $99	*N/A*	*34*
Less than $100	20	N/A
$100 to $499	50	33
$500 to $999	33	5
$1,000 to $4,999	40	2
$5,000 to $9,999	10	0
$10,000 and more	N/A	0
$10,000 to $24,999	*5*	*N/A*
$25,000 to $99,999	*2*	*N/A*
$100,000 and more	*0*	*N/A*
Don't know	0	0
No opinion	4	5

3.4 Sociodemographic Variations by Product

A comparison of the sociodemographic parameters of the visual arts survey respondents by type of product purchased shows few variations: paintings, prints, sculptures and drawings are purchased by individuals who are practically identical in sociodemographic terms. There are certain variations among those who buy photographs and textile works, but there is no clear trend to substantively distinguish them from the sample

1 The visual arts respondents supplied information regarding their three most recent purchases, and general public respondents were asked the value of their last purchase. In both cases, the percentages indicate the proportion of respondents who purchased works in each price category; taking into account multiple purchases by most visual arts respondents, the number of purchases were added and the percentage was calculated on the total.

2 For example, a credit card company seems to have identified the same target market and is currently offering to its members a Van Gogh lithography published and authenticated by a famous Amsterdam museum. The print comes framed and covered by non-reflective glass, includes a silver commemorative medallion and is accompanied by an official certificate of authenticity. It costs $299 – or $62.33 in five monthly instalments.

average. This is true both for respondents who say they made a purchase in the past year and for those who made a purchase within the past five years. The few variations noted are presented for each type of product.

Table 5.18

Visual Arts – MENTIONS OF PURCHASE AND GENDER VARIATIONS

	VISUAL ARTS AVERAGE	ORIGINAL PAINTINGS	ORIGINAL DRAWINGS	ORIGINAL PRINTS	FINE ART PHOTOGRAPHY	SCULPTURES	ORIGINAL TEXTILE ARTWORK	VIDEO AND OTHER MEDIA ART	INSTAL-LATIONS
	%	%	%	%	%	%	%	%	%
IN THE LAST YEAR									
Male	50	53	60	54	54	52	30	71	53
Female	50	46	40	45	46	47	69	29	47
Mentions of purchasing	*2,705*	*645*	*287*	*447*	*175*	*323*	*107*	*28*	*15*
IN THE LAST FIVE YEARS									
Male	50	51	56	52	56	50	33	63	56
Female	50	48	44	48	44	49	66	34	44
Mentions of purchasing	*3,753*	*962*	*534*	*734*	*315*	*530*	*233*	*38*	*18*

Unlike previous sections, Table 5.18 and the following section, are not derived from the number of respondents to the visual arts survey, but from the number of actual mentions regarding art purchases for each type within the past one or five years. Thus, the sociodemographic characteristics of a respondent who says she/he bought a painting within the past five years and a sculpture in the past year will be found in the data for both types of product. In the sections dealing with numbers of purchases, men and women are represented in equal proportions (50%), rather than in the percentages associated with the surveys (46% men and 54% women).

The even division of purchase mentions between the sexes is not constant; however, a majority of most types of product purchases were reported by men. The differences between types of products is limited to a greater preference by men for drawings and a greater preference by women for textile arts. There are also more women who indicated *no opinion*.

There is a considerable variation in the number of mentions by type of product. There are high percentages of reported purchasing behaviour for paintings, prints, sculptures and drawings, fewer for photographs and textiles, and almost none for videographic works and installations.

3.4.1 PAINTINGS, PRINTS, SCULPTURES AND DRAWINGS

Paintings, prints, sculptures and drawings are the works most often reported as purchased in both the visual arts and the general public surveys.

All variations in the sociodemographic profiles of the visual arts survey respondents who say they bought one of these four types of works are under 4%, with the majority being less than 2%. Purchase of these four types of product seems to interest individuals with similar sociodemographic characteristics, close to the average for the visual arts sample overall, as presented in Table 5.4..

For the four most popular types of products, buyers seem to form a single block, which leads to the suggestion that the painting and drawing markets, if they exist, are not segmented or defined in terms of sociodemographic criteria, but in terms of taste and aesthetics.

3.4.2 PHOTOGRAPHS

Though close to the average for the sample, photographic works are the most differentiated product category. This differentiation is particularly expressed in terms education, household income and age.

Among respondents who have made a purchase within the past five years, there is a small but clear trend with regard to household incomes. Households with incomes in the $60,000 to $69,000 category are underrepresented by 1%, which increases with each income segment until it reaches 5% for household incomes of $150,000 and over. Similarly, household incomes of less than $60,000 are overrepresented by 1% to 5%, with the $30,000 to $39,999 (3%) and $40,000 to $49,999 (5%) showing the greatest difference. The same type of division in terms of under- and overrepresentation is found in respondents who say they bought a work of art in the past year.

The same variance is apparent with regard to the age of respondents who say they have acquired a work of art within the past five years. Those under age 45 are overrepresented (by 5% for those aged 25 to 34 and 10% for those aged 35 to 44), while the three higher age categories are underrepresented, by 6%, 4% and 4%. Once again, the same trend is observed in respondents who say they have made recent purchases, with the variance being more pronounced for those with higher incomes. This age variance is confirmed by the life situation data, which shows more respondents aged 45 and under than average, particularly among singles with no children and couples with no children.

The same variance is apparent with regard to the age of respondents who say they have acquired a work of art within the past five years. With regards to education, the differences are not drawn so clearly. There is a slight overrepresentation of college graduates, working against a slight underrepresentation of high school graduates. There is no significant distinction in terms of gender.

It appears therefore that photographs are acquired by people who are as educated as those who buy other products, but who are also younger and less affluent. Photographs could well be an interesting product of entry into the visual arts market. Perhaps more points

of sale could introduce photographs into their inventory, with the aim of reaching out to the new, younger consumers.

3.4.3 TEXTILE ART

The purchase of textile art work is differentiated from the other types of products in terms of gender. Having made 29% more purchases than the average in the past year, women (69%) show a greater interest than men (30%) in textile arts. The data for acquisitions within the past five years shows a similar pattern, and the data for the five years versus one year is significant, with respective variances of 9% and 6%, given the more restricted number of mentions compared to the previously examined types of products.

Buyers of textile arts are less present than average among household incomes under $40,000 and more present among those who declare an income of $40,000 to $69,999, and particularly in the $60,000 to $69,999 category (6%), while being slightly underrepresented in the above $125,000 category.

With regard to age, and particularly for those who made a purchase within the past five years, there are more respondents aged 45 and over and fewer respondents aged 45 and under, with margins varying between 2% and 5%, which inverts the trend thus far demonstrated for purchasers of photographs.

More women are interested in textiles, and a greater interest is shown by respondents who are slightly older and have median rather than high or low income.

3.4.4 VIDEOGRAPHY - OTHER MEDIA AND INSTALLATIONS

The main characteristic of these two types of products is their apparent rarity for sale in the market place and the minimal interest shown by respondents. With appropriate reservations given the potential for high margins of error, the following trends can be vaguely demonstrated:

- Respondents who say they bought videographic and other media works in the preceding year (28 mentions) and within the past five years (38 mentions) are slightly more likely to be men, less educated, less affluent and younger than the sample average.
- Fewer than 20 respondents say they have bought an installation in the past year or five years; in both cases, almost all respondents are between 35 and 54 and have at least a Bachelor's degree.

The small number of respondents, the relative scarcity of the products, their different mode of exhibition and their lower visibility compared to other types of visual art products leads one to wonder how the questions on videographic works and installations were interpreted. It is possible that certain respondents, even within an informed sample, could confuse videographic works with videos about art, or even with other types of videos (music, film, etc.); the meaning of *installation* could also vary from respondent to respondent. On the other hand, such works have been, for the time being, most often seen in the halls of public institutions rather than in the living room of private homes.

3.4.5 No Opinion

The significant number of respondents who did not express an opinion indicates that these respondents did not make a purchase within the past year or five years (see Table 5.16).

With higher percentages of women, the *no opinions* have a tendency to be more numerous among those who have a Bachelor's degree or less, are under 35, and have household incomes of less than $40,000. They are also found in greater proportion, among those reporting no purchases made within the past year, among single parents and those who are married, under 45 and have children at home. These modest variations, without drawing other conclusions from the visual arts survey findings, nevertheless have an impact on national averages, particularly in the case of purchases made within the past year.

Given that a large portion of respondents have not purchased a work of art in the last five or past year periods mentioned, the findings agree with the sociodemographic tables that compare the visual arts survey respondents with the general public respondents: buyers are more highly educated, more affluent and older.

Only the underrepresentation of women in the no opinion category - and presumably in the non-purchaser category - adds a nuance to the preceding picture which suggest that slightly more present in the visual arts survey, women may be less present among purchasers of all types of products, except textile arts.

3.4.6 Observations

Apart from gender, the cross-tabulating of most sociodemographic variations in age, education, household income and life cycles with the reported purchasing behaviour for the various types of products is fragmented and low. As stated earlier, the artistic media by itself seem to have some potential to be the foundation of marketing strategies, although few significant or useful trends were observed with regard to market segmentation using the types of products.

4 Points of Sale

This section presents, by type of point of sale, the sociodemographic variations for respondents and the art works acquired. Again, points of sale refer to the intermediary through which visual arts survey respondents were attained – commercial galleries, professional artists, artist-run centres, etc.

The reader will take note that it is not systematically possible to connect respondents' purchase related answers with the point of sale that referred them, since nothing ensures the respondents acquired all or part of their works from the same point of sale or even from other points of sale of the same type which referred them. However, there is most probably a connection, as the respondents' name and address are known by the latter.

4.1 Sociodemographics by Point of Sale

Table 5.19 shows important variations among the groups of respondents to the visual arts survey according to the intermediary that contacted them[1].

4.1.1 COMMERCIAL GALLERIES

There are slightly more respondents in the 45-and-over category, and slightly less in the under 35, in the group contacted through the professional galleries, compared to the other respondents in the visual arts survey.

The breakdown of respondents by life situation suggests that the *age* factor, and not the *children at home* factor, tends to limit the presence of parents in the professional gallery sample. Respondents 45 and under, single or married, without children, are underrepresented. In the same age category, married respondents with children are only 1% in variance from the average. Respondents 45 and over, married, with and without children, are overrepresented (46% versus 36%).

There are also more respondents referred by commercial galleries represented in the high salary levels (65%), and particularly in the top salary levels, in which as many as 3 out of 10 respondents say they have an income of $150,000 and over. Household incomes under $40,000 are underrepresented in relation to other points of sale. There is no noticeable difference in terms of education or gender.

4.1.2 FRIENDS OF MUSEUMS

The friends of museums closely resemble the commercial gallery respondents. It may be the case that an important proportion of commercial galleries visitors are also members of a friends of museums association. There are fewer respondents with less than a College degree and more Bachelor degrees than for respondents referred by commercial galleries. Among those with the most education, the sampling has the largest proportion of individuals with professional degrees (19%). In terms of household income, there are almost no friends of museums represented in the under $20,000 income category, and there is a smaller segment than average in the $40,000 to $59,999 bracket (11% as opposed to 19%). They appear in the same proportion as commercial gallery respondents in the $60,000 and over bracket, and the distribution of income is more evenly divided; even so, 19% of respondents claim revenues of over $150,000.

Friends of museums have, in relation to the average and in relation to commercial galleries, a slightly lower proportion of singles, of all ages. Life cycle categories are dominated, however, by married respondents, aged 45 and over, without children at home. This group may be composed of a high proportion of retirees whose children have started their own households.

1 Due to the low number of statistically significant results when doing the breakdown into several segments for respondents from craft galleries (82), shopping centre galleries (63) and auctions (29), it was not possible to analyze their socio-demographic parameters.

Table 5.19

Visual Arts – SELECTED SOCIODEMOGRAPHIC VARIABLES ACCORDING TO VISUAL ARTS AND CRAFTS POINTS OF ACCESS

	VA AVERAGE	COMMERCIAL GALLERIES	FRIENDS OF MUSEUMS	PROFESSIONAL ARTISTS	ARTIST-RUN CENTRES	FAIRS
	%	%	%	%	%	%
EDUCATION: highest level						
Less than high school	1	1	1	1	0	1
High school diploma	11	14	9	7	6	18
College	15	14	17	11	16	21
Some university	–	–	–	–	–	–
Bachelor's degree	30	26	31	31	32	26
Grad./prof. degree	43	44	41	49	40	34
Professional degree	*15*	*16*	*19*	*10*	*14*	*17*
Master's degree	*22*	*23*	*19*	*34*	*19*	*14*
Doctorate degree	*6*	*5*	*4*	*5*	*8*	*2*
AGE						
16 - 24 years	2	1	1	1	3	1
25 - 34 years	17	10	15	21	29	15
35 - 44 years	32	29	19	40	38	34
45 - 54 years	26	29	25	25	19	26
55 - 64 years	15	19	22	7	7	14
65 years and over	9	10	18	7	4	9
HOUSEHOLD INCOME						
Less than $10,000	3	2	0	7	4	4
$10,000 - $19,999	9	4	1	20	13	9
$20,000 - $29,999	9	5	11	10	14	9
$30,000 - $39,999	8	6	7	9	11	11
$40,000 - $49,999	10	8	6	10	13	17
$50,000 - $59,999	9	7	5	8	10	16
$60,000 and over	50	65	65	33	34	29
$60,000 - $99,999	*23*	*22*	*24*	*23*	*24*	*21*
$100,000 - $124,999	*7*	*9*	*12*	*3*	*4*	*5*
$125,000 - $149,999	*4*	*15*	*10*	*2*	*2*	*1*
$150,000 and over	*6*	*29*	*19*	*5*	*4*	*2*
LIFE CYCLE STAGE						
Single, no children at home, under 45 years	16	13	9	22	23	11
Married, no children at home, under 45 years	16	12	12	19	22	19
Married, children at home, under 45 years	16	15	14	17	20	17
Single parent	6	4	6	8	6	10
Married, children at home, 45 years and over	15	19	17	11	11	15
Married, no children at home, 45 years and over	21	27	35	12	12	20
Single, no children at home, 45 years and over	9	11	7	12	6	8
GENDER						
Male	46	49	36	47	48	33
Female	54	50	64	52	51	67
Respondents	1,672	595	150	261	352	140

The most important differences are in the age category: there are more friends of museum respondents in the 55-and-over category, and particularly in the 65-and-over category (18%, double the visual arts average), and a higher percentage than the commercial galleries in the 25 to 34 age group (15%). Another major characteristic of the friends of museums, in relation to both commercial galleries and the average, is with regard to gender: 64% are women, which may reflect a strong female presence in volunteer and other support associations.

4.1.3 Professional Artists

Respondents reached via mailing lists of professional artists seem to belong to a different world than the two previous groups, particularly with regard to respondents reporting high income and more senior ages. The respondents contacted through professional artists are by far the most educated (49% post-graduate, 34% with Masters), have the highest representation in the 35-to-44-year category (40% compared to the average of 32%), and have a higher proportion in the 25-to-34-year category with fewer respondents in the more senior ages.

The inverted age pyramid is shown in the breakdown of the life cycle, in which those aged 45 and under have a higher than average representation. In these two age groups, singles and single parents are slightly more represented than married respondents.

In terms of income, more of these respondents claim incomes of less than $20,000 (27%) than in the overall visual arts survey (12%), and also than the general public (21%). There are also smaller proportions in the upper salary levels (33% with more than $60,000, 23% declaring a household income of less than $100,000).

4.1.4 Artist-run Centres

Artist-run centres provided respondents whose education is close to the visual arts average (except for doctorates: 8%, the highest percentage). In a visual arts sample that is marked by respondents who are older than the general public, the artist-run centres reach the youngest respondents, even in relation to the general public: there are almost as many in the 35-to-44-year category as provided through professional artists (38%) but there are many more in the 25-to-34-year category (29%). The corollary is a lower representation of the 55-and-over category. The same phenomenon is found with regard to income: there is a greater percentage of average household incomes from $20,000 to $59,999. These lower incomes may be explained in part by the probable presence of a significant proportion of visual artists in the membership of and among visitors to such organizations.

The life cycles confirm the high representation of the 45-and-under category, which is more marked for singles and married respondents with no children.

4.1.5 FAIRS

Respondents contacted through fairs are, in this sample, an exception. With regards to education, this segment has the highest percentage of high school and college diplomas (18% and 21%) and lower proportions of university degrees, though these are higher than for the general public. In terms of age, fair respondents match the average of the visual arts sample, and thus hold a statistical position half way between the commercial galleries and the friends of museums on the one hand, and professional artists and artist-run centres on the other. They have the smallest percentage of high incomes (29% with $60,000 and over) but are distinguished by their stronger showing in incomes of $40,000 to $59,000 (17% and 16%, results which are comparable to those of the general public: 18% and 11%).

The fair respondents also form the only group in which no category of respondents living in couples is underrepresented: respondents who are married and without children are slightly more present than average and those who are married with children have an average representation. Parents living alone are more present (10% versus an average of 6%, the strongest proportion of the visual arts sample). Women were well represented among respondents attained through this type of point of sale, with, at 67%, the highest percentage of the sample.

4.2 Purchase of Works of Art by Point of Sale

The most often preferred point of sale for visual arts survey respondents is, by a large majority, the artist. In answer to the question, *How do you prefer to purchase a work of art*, 55% of respondents said the artist was their first choice, and only commercial galleries received a significant rate of preference (28%) close to this level.

Table 5.20

Visual Arts – PREFERRED POINT OF SALE FOR PURCHASING ARTWORK (FIRST CHOICE BY TYPE OF POINT OF SALE)[1]

	VA AVERAGE	COMMERCIAL GALLERIES	FRIENDS OF MUSEUMS	PROFESSIONAL ARTISTS	ARTIST-RUN CENTRES	FAIRS
	%	%	%	%	%	%
HOW DO YOU PREFER TO PURCHASE A WORK OF ART?						
Directly from the artist	55	38	57	73	64	73
At a commercial gallery	28	49	26	15	11	11
At an artist-run centre	4	2	3	2	8	5
At an auction	4	3	5	2	3	1
At a fair, salon or exhibition	3	2	4	2	3	1
At a fund-raising event	1	1	0	0	2	0
Through an agent	1	1	1	0	0	0
From another collector	0	0	1	0	0	0
No opinion	5	5	3	6	8	5

1 The samples from craft galleries (82 respondents), shopping centre galleries (63 respondents) and auctions (29 respondents) are too small to be analysed in this table.

The one exception to this trend, as noted in Table 5.20, is among those respondents referred by professional galleries, who make this type of point of sale their first choice (49%). Nevertheless, even a high percentage (38%) of that group says they prefer to buy the work from the artist.

A vertical reading of Table 5.20 shows respondents have a certain loyalty to the point of sale that referred them: the highest percentage of responses related to their point of sale is provided by commercial gallery respondents (49%), respondents from professional artists (73%) and respondents from artist-run centres (8%). Friends of museums provide the highest number of respondents mentioning auction houses (5%), fairs or craft shows (4%) and other collectors (1%).

Fund-raising events and agents do not arouse much enthusiasm in respondents.

Table 5.21

Visual Arts – PREFERRED POINT OF SALE FOR PURCHASING ARTWORK (THREE CHOICES COMBINED WITH TYPE OF POINT OF SALE)

	VA AVERAGE	COMMERCIAL GALLERIES	FRIENDS OF MUSEUMS	PROFESSIONAL ARTISTS	ARTIST-RUN CENTRES	FAIRS
	%	%	%	%	%	%
HOW DO YOU PREFER TO PURCHASE A WORK OF ART						
Directly from the artist	81	76	79	88	84	87
At a commercial gallery	63	79	67	57	39	50
At an artist-run centre	33	25	22	36	48	42
At an auction	28	30	29	25	25	16
At a fair, salon or exhibition	26	24	31	19	24	40
At a fund-raising event	24	18	30	21	34	23
From another collector	8	9	7	9	6	6
Through an agent	6	7	6	5	5	6
No opinion[1]	5	5	3	6	7	5

Table 5.21, like the preceding table, deals with the preferred point of sale for visual arts survey respondents, this time by combining the three choices allowed. The table thus provides the percentage of respondents who chose a point of sale as first, second or third choice.

The multiple mentions create three point-of-sale groups:

- Respondents' preferred points of sale are artists, who continue to top the list for eight out of ten respondents, and professional galleries, which follow closely with 63%.
- A second cluster, marked by average rates of preference (± 30%), groups together artist-run centres, auction houses, fairs and fund-raising events.

1 The percentages indicate the proportion of respondents in each category who acquired one, two or three works, which gives totals higher than 100%.

- A third group, while it has better results than the single first choice, receives only a low rate of preference; other collectors receive 8% and agents 6%.

Respondents' appear to remain loyal to their point of sale. As with the three other points of sale, the highest percentage of responses (40%) received by fairs was provided by respondents. It is clearer in Table 5.21 than Table 5.20 that respondents visit several types of points of sale.

In moving from preferences for points of sale to actual place of purchase, the professional gallery is by far the point of sale most visited by the visual arts survey respondents, as shown in the first part of Table 5.22: 58% of reported purchases took place in professional galleries, while reported purchases from individual professional artists are in second place at 38%. In the same cluster as artist-run centres, fairs and auction houses, it is surprising to discover 9% for fund-raising event sales. Agents received 3% of respondents' most recent purchases.

Respondents' loyalty to their point of sale remains steady for commercial galleries (72%), professional artists (52%), artist-run centres (18%) and fairs (9%), but substantial variations in purchase locations occur according to the respondent's group.

Professional gallery and friends of museums respondents make the majority of their purchases in commercial galleries; their second choice is from professional artists, while other points of sale are given lower rates, including artist-run centres. Inversely, respondents referred by professional artists and artist-run centres opt first for buying from professional artists, then from commercial galleries, and make a few purchases, as do fair respondents, from artist-run centres. The reader will see below how the duos – commercial galleries/friends of museums and professional artists/artist-run centres – are similarly linked when comparing the sociodemographic characteristics of respondents.

4.2.1 Types of Works Acquired

The types of works acquired by respondents in their three most recent purchases receive the same ranking as that observed in Table 5.15 for purchases within the past one or five years. Paintings, the highest ranked, are particularly preferred by respondents from professional galleries (73%) and friends of museums (64%), while drawings are more attractive to respondents from professional artists (31%). The artist-run centre respondents report more purchases of fine art photography (23%), while textile works receive by far the greatest number of mentions by fair respondents (17%) and, to a lesser extent, artist-run centres (8%). Prints and sculptures are evenly divided among respondents from all points of sale. Video art and installations are rarely bought by the sample respondents: 2% of respondents referred by artist-run centres say they made such purchases.

Table 5.22

Visual Arts - THREE MOST RECENT ARTWORK PURCHASES

	VA AVERAGE	COMMERCIAL GALLERIES	FRIENDS OF MUSEUMS	PROFESSIONAL ARTISTS	ARTIST-RUN CENTRES	FAIRS
	%	%	%	%	%	%
PLACE OF PURCHASE						
Commercial gallery	58	72	60	48	38	48
Directly from the artist	38	27	34	52	49	49
Artist-run centre	9	5	3	11	18	11
Fund-raising event	9	8	8	7	14	8
Fair, salon, exhibition	8	7	8	5	5	9
Auction house	7	6	6	5	7	3
Through an agent	3	2	6	3	2	2
Other	9	7	8	11	11	11
No opinion	10	9	10	11	10	11
TYPE OF ARTWORK						
Original paintings	65	73	64	59	58	57
Original prints	35	32	38	36	38	38
Sculptures	28	30	29	31	29	31
Original drawings	19	15	18	31	22	16
Fine art photography	12	8	11	16	23	10
Original textile artwork	8	6	6	3	8	17
Video art or other media art	1	0	0	1	2	0
Installations	1	0	1	1	2	1
No opinion	3	2	4	3	4	5
COST OF ARTWORK						
Less than $100	20	13	24	21	33	28
$100 to $499	50	38	55	59	58	69
$500 to $999	33	33	26	36	31	27
$1,000 to $4,999	40	54	31	32	27	19
$5,000 to $9,999	10	16	8	7	4	1
$10,000 to $24,999	5	9	7	1	1	0
$25,000 to $99,999	2	2	1	0	0	0
$100,000 or more	0	0	0	0	0	0
Don't know	0	0	0	0	0	0
No opinion	4	4	5	5	4	3
CANADIAN ARTIST						
Yes	92	92	93	91	93	90
No	24	27	31	22	16	26
Don't know	3	3	2	1	6	3
No opinion	1	1	0	3	1	0
PROFESSIONAL ARTIST						
Yes	94	96	91	95	92	93
No	9	5	14	7	13	10
Don't know	9	8	10	5	12	17
No opinion	1	1	1	1	1	0
PURCHASED FOR						
Yourself	96	97	97	95	96	95
Gift	16	15	16	12	20	17
No opinion	2	1	0	3	2	1
Respondents	1,185	467	97	151	245	88

4.2.2 COST OF WORKS ACQUIRED

The most costly works reported as purchased were acquired by commercial gallery respondents. As is apparent in the third part of Table 5.22, commercial gallery respondents have the highest percentage of acquisitions for all price categories above $1,000, and a notable 2% for works costing from $25,000 to $99,999, and 9% for works of $10,000 to $24,999. While commercial gallery respondents did buy works costing under $500, they did so in fewer numbers, particularly for purchases of $100 and under (13%).

Respondents referred by fairs buy the lowest priced works - 28% for works priced at $100 and under and 69% for works priced $100 to $499. They are almost non-existent (1%) or statistically absent (less than 0.5%) from price categories higher than $5,000.

Friends of museums respondents are the only ones who acquired works of art in the same price categories as commercial gallery respondents. However, acquisitions in categories under $500 are more numerous, and in categories higher than $500, less numerous. It should be noted that the most expensive acquisitions are just slightly less numerous than for commercial gallery respondents.

Prices paid for the three most recent purchases by respondents referred by professional artists are not as high, and there are more in the lower price categories than for the friends of museums, except in the $100 to $4,999 range, which is well represented (32%). The same downward trend is more pronounced for artist-run centre respondents.

When the prices paid by the visual arts survey respondents were compared with those of the representative general public sample, it was noted that both samples contained a remarkably high proportion of reported transactions at considerably lower prices than ordinarily assumed for such products, thus challenging the generalized perception that works of art are very expensive goods. Table 5.22 provide a base for this perception, showing that commercial galleries easily report the highest prices paid as a large majority of respondents report purchases of more than a thousand dollars. However, it is interesting to note that the very same respondents also contradict the perception: two out of five respondents referred by commercial galleries report purchases between $100 and $499, and one in three between $500 and $999.

4.2.3 NATIONALITY AND STATUS OF CREATORS

The fourth and fifth sections of Table 5.22 explore the Canadian citizenship and professionalism of the creators of the works acquired, as well as the purchaser's degree of awareness of these characteristics.

Only 4% and 10% of buyers, respectively, were unaware of the nationality or the professional status of the artists whose works they had bought, which suggests a higher than expected awareness on these issues.

Those who were the most unaware of the artist's status were buyers referred by fairs (17%). Respondents contacted by professional artists and professional galleries knew the status of the artist in greater proportions than average. One would think that the nature of the contact with the client at these two points of sale would allow a good introduction

to the artist and the work, while fairs, which are good places for impulse buying, are less effective in this regard.

The higher-than-average rate of unawareness noted for both nationality and for professional status among respondents from artist-run centres (6%, 12%) raises questions about the quality of their interactions with the clientele, and particularly about the information provided to potential purchasers.

However, in spite of a sometime lack of awareness, more than nine out of ten respondents said they had bought Canadian works of art, and one in four had bought a non-Canadian work. This proportion varies little for Canadian works; two groups of respondents move significantly beyond the average for the purchase of a work by a non-Canadian artist: respondents referred by artist-run centres are less frequent in specifying Canadian work (16%) and friends of museums are more frequent (31%). Curiously, more of the latter report purchasing works by non-professional artists (14%).

Note: respondents referred by fairs purchase average proportions of works by non-professionals.

4.2.4 GIFTS

Almost all respondents had bought a work for themselves. However, gift purchases should not be underestimated: 16% of respondents say one of their three most recent purchases was a gift.

5 PURCHASE

5.1 Factors Affecting Purchases

Respondents to the visual arts survey were offered a battery of factors that could potentially affect them when purchasing a work of art and they were asked how important each factor was to them. Table 5.23 presents the reactions to such factors by point of sale. In analysing these results, it was decided to clearly dichotomize the position of respondents by defining two clear-cut positions, very important (indicated by a + sign at the top of left hand columns) and not at all important (– sign, right hand columns). The two median positions (somewhat important, of little importance), the traditional refuge of the undecided, are ignored. The factors affecting purchases are sorted, according the intensity of the reactions, in four blocks.

5.1.1 ENTHUSIASTIC REACTIONS, WITH NO SECOND THOUGHTS

Response to the statements "You really like the artwork and want to be able to enjoy it" and "You fall in love with it" were easily the most often cited as reasons affecting purchase. It will come as no surprise to find the lightning bolt effect (everyone's desire is to fall in love, totally, with complete satisfaction) in this category. The most popular statement with the very interested (81%) also mentions attachment, though in a more measured fashion (really like), but adds the notion of possession: *want to enjoy it in your own home*. Fully 76% fell in love with the work of art. The need to possess could be implicit in this *fell in love with it* statement.

These two statements not only received a tremendously positive response, but were also well ahead of the third-ranked statement (46% and 51%). The gap says it all: one sees the primacy of an irrepressible motivation that comes from an individual and unique experience of the work. The desire to possess it may complete the first factor or, for those moved by more pragmatic motives, supplement it.

The segmentation of answers by point of sale did not change the domination of these two statements but demonstrates a few meaningful variations in intensity: more lukewarm among the artist-run centre respondents and friends of museums, more enthusiastic among respondents referred by fairs and shopping centre galleries.

5.1.2 Polite Agreement

There are two other factors – *add artwork to collection* (30%) and *artwork intellectually challenging* (25%) – that a significant minority say are very important in affecting their decision to purchase, although other respondents (more than half the very important rating) say the same factor is not important. These two factors seem like a subsidiary of the first two above, revealing a connection to the same themes with regard to specialized clienteles.

Possession is still present in the third factor relating to the desire to *add a work to a collection*. As will be seen, 30% of survey respondents say they are collectors; indirectly therefore, the proportion of respondents considering adding to their collection could be higher than the apparent 30%. Collection is of particular interest to respondents contacted by commercial galleries: at 37%, they are seven points above the average. Shopping centre gallery and auction house respondents are also high in this regard.[1] Other types of respondents accord slightly less importance than average to the collection factor.

The work acquired being *an intellectual challenge* (25%) may be related to the other themes endorsed, in that such challenge may be about an exceptional experience that some individuals desire. It is revealing that the respondents contacted through professional artists (31%) and artist-run centres (30%) are most interested in this factor, and are also the only two higher than the average. This may be possibly due to an interest in the artist's creative process, with which they may well be more familiar.

5.1.3 A Negative Neutrality

The seven factors of this group, when placed in order of importance, are all characterized by small proportions of very important (14% to 10%), but particularly by the higher proportions of not important, which vary between 16% and 24%. Respondents are not completely opposed, but the apparent neutrality is negatively rather than positively tinged for factors such as reputation of the artist, knowing the artists personally, courteous gallery staff/make you feel comfortable, competent gallery staff, works reflect your cultural/regional traditions, gallery reputation and dimensions conform to space available.

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1 However, it should be noted that the statistical margins of error applicable to the results for these two small samples are 12% and 19% respectively.

Table 5.23

Visual Arts– FACTORS AFFECTING THE PURCHASE OF A WORK OF ART

	VA AVERAGE		COMMERCIAL GALLERIES		FRIENDS OF MUSEUMS		PROFESSIONAL ARTISTS		ARTIST-RUN CENTRE		FAIRS		CRAFT GALLERIES		SHOPPING CENTRE GALLERIES		AUCTIONS	
	%		%		%		%		%		%		%		%		%	
	+	-	+	-	+	-	+	-	+	-	+	-	+	-	+	-	+	-
Enthusiastic Reactions, With No Second Thoughts																		
You really like the artwork and want to enjoy it in your own home	81	2	84	1	79	1	79	3	75	2	84	1	76	2	87	0	86	0
You fall in love with it	76	1	76	1	71	1	78	3	72	2	84	0	85	0	78	0	76	0
Polite Agreement																		
You want to add it to your collection	30	19	37	15	26	14	25	24	22	23	21	26	23	20	40	8	59	7
The work is intellectually challenging	25	14	23	15	19	18	30	15	31	11	22	16	21	16	16	10	10	24
A Negative Neutrality																		
The reputation of the artist	14	16	20	11	16	16	11	25	9	20	9	19	9	13	19	5	28	10
You know the artist personally	14	22	9	27	13	23	16	20	19	14	20	19	11	26	19	21	10	24
The gallery's staff are courteous and make you feel comfortable	13	26	18	18	10	29	8	39	7	34	16	24	13	22	29	11	10	17
The gallery's staff are competent	12	29	17	19	15	25	6	42	7	39	12	31	9	21	13	19	21	41
The work reflects your cultural/regional traditions	11	29	10	29	17	27	12	36	10	27	11	19	12	26	16	24	7	28
The gallery's reputation	11	32	17	21	11	32	7	43	5	43	6	40	6	28	14	17	14	28
The dimensions conform to the space you have available	10	24	10	22	13	22	8	30	9	24	14	22	10	22	3	17	7	41
Rejection																		
You want to offer the work of art as a gift	4	47	2	54	5	48	3	48	5	39	6	44	6	32	14	43	3	62
You are able to use your credit card	4	57	4	60	5	59	3	67	3	54	8	44	6	45	6	38	0	69
The work of art is from an unknown artist	3	34	2	37	4	37	2	38	7	25	4	28	4	30	2	32	3	62
The work of art is primarily an investment	2	41	2	32	3	35	1	48	2	51	3	54	2	43	2	27	3	24
You want a work of art that matches your decor	2	56	2	53	5	46	2	63	3	64	3	46	0	59	5	46	0	66
The work of art is a tax shelter	1	73	1	73	1	70	1	74	1	72	1	81	1	73	2	60	0	90
Respondents	1,672		595		150		261		352		140		82		63		29	

The + columns present the percentages of respondents considering the factor *Very important*, and the - columns, *Not at all important.*

The heart has its reasons of which the mind knows naught, as rationality factors do not seem sufficient to excite the enthusiasm of respondents - not the reputation of the artist, not the quality of service, not even the work being the right size. These factors do not appear to be motivations; however, more than half the respondents said they were somewhat important or not too important, which indicates that they do have some relevance and could constitute, particularly if they are unsatisfying, a potential constraint to purchase.

However, a few variations by types of point of sale merit attention:

- The reputation of the artist is more important for commercial gallery respondents and less important for professional artists and artist-run centres; the inverse is true when the respondent knows the artist personally.
- Respondents referred by commercial galleries give greater importance to the two factors relating to gallery personnel and the gallery's reputation.
- That the work reflect the region or the personality of the buyer has slightly more importance among friends of museums.
- Respondents contacted by fairs admit somewhat more than others that the size of the work is an important factor.

5.1.4 Rejection

Finally, *offering a gift,* despite the reported behaviour observed in Table 5.22, and *fitting in with the decor*, are marketing arguments that do not have much support. The work of a young, unknown artist is considered very important by only 3% of respondents, but the proportion citing this factor as not important is the lowest for this block (34%), which indicates a certain potential for the marketing of works of upcoming artists. Respondents referred by artist-run centres are somewhat more sensitive to this factor. Finally, it is striking that all the proposed factors related to money (investment, tax shelter, credit card) are found in this block and that, they are, with substantive unanimity among the points of sale, considered as not important.

What may be of interest to the reader concerned with marketing of works of art is that respondents reacted negatively to the mention of such factors in proportions inversely related to the tremendous support for less rational factors, such as *fall in love with it* and *really like/want to enjoy it in own home.*

One exception: slightly more fair respondents consider the possibility of using a credit card very important, which suggests that this option may not be always available.

5.1.5 Observation

These findings carry a clear message: the purchase of a work of art is a personal, private matter, whether nourished by passion or possession; it is not perceived as a matter of money or investment.

5.2 The Importance of Certain Characteristics of the Works

The geographic origin of the work is of little consequence in making a purchase decision. Almost no one prefers foreign works (1%) as very important, and few cite a preference for works of their city, region or province (4% each). However, there is a slight enthusiasm for Canadian work (12%), as Table 5.24 points out.

Table 5.24
Visual Arts – IMPORTANCE OF GEOGRAPHIC ORIGIN OF WORK PURCHASED

	Very important %	Not at all important %	Average*
From your city/community	4	56	3.38
From your region	4	54	3.35
From your province	4	54	3.33
From Canada	12	47	3.02
From a foreign country	1	65	3.63

* Average: 1 represents complete agreement with *very important* and 4 represents complete agreement with *not at all important*.

Variations for works of Canadian origin for respondents grouped by point of sale are low but, as shown in Table 5.25, not without significance.

Table 5.25

Visual Arts – IMPORTANCE OF ART WORKS' CANADIAN ORIGIN TO PURCHASE BY TYPE POINT OF SALE

	TOTAL %	COMMERCIAL GALLERIES %	FRIENDS OF MUSEUMS %	PROFESSIONAL ARTISTS %	ARTIST-RUN CENTRES %	FAIRS %	CRAFT GALLERIES %	SHOPPING CENTRE GALLERIES %	AUCTIONS %
Very important	12	15	11	7	9	15	9	19	31
Important	20	23	27	14	17	19	17	30	24
Somewhat important	17	18	13	9	20	23	17	14	14
Not at all important	47	40	45	67	50	39	56	30	28
No opinion	4	4	4	4	3	4	1	6	3
Average*	**3.33**	**2.86**	**2.96**	**3.41**	**3.16**	**2.90**	**3.22**	**2.59**	**2.39**
Respondents	1,672	595	150	261	352	140	82	63	29

* Average: 1 represents complete agreement with *very important* and 4 represents complete agreement with *not at all important*

One should note that the professional gallery and friends of museums respondents give more than average importance to the Canadian origin of work. For respondents from artist-run centres, the reaction is below average for this question, and also slightly lower than the average importance given it by respondents from all other groups.

The other variations by types of point of sale are minimal: the few respondents contacted through auction houses are more interested in foreign works; respondents referred by professional artists are the least likely to cite Canadian origin as important; fairs and shopping centre galleries respondents express more attachment to works originating from the city/community, region and province.

Where geography has little impact, human geography has a great deal of impact. When respondents express their *marked preferences* for works in which the aesthetic is culturally related, there are substantial variations. Table 5.26 shows that a majority of visual arts survey respondents (58%) express a preference for the contemporary North American or European aesthetic. Since respondents basically had to choose between *contemporary* and *classical*, the first category would probably contain all abstract, hyper-real and impressionist tendencies - in general, the works of the twentieth century, or of modernity. Classical North American or European would basically include pre-twentieth century works and, as a general rule, the figurative. It is possible that some respondents may have considered the term contemporary in its restrictive aspect and included the great masters of the early part of the century in *classical*. That being said, the breakdown into schools has minor importance; what stands out is the clear preference for the contemporary over the classical.

Works inspired by the two aboriginal peoples of Canada receive a marked preference from one in three respondents, 33% preferring Inuit art and 30% works of art created by the native peoples of North America.

Significant minorities also express a preference for works of Asian cultures (23% Japanese, 16% Chinese and 12% other Asia) and works inspired by Black African (17%), South American (12%) and Arab (6%) cultures. Four percent (4%) of respondents expressed a preference for the cultural aesthetics of another heritage, and only 5% had no opinion.

The preferences of friends of museums are almost the same as the visual arts survey average, with the exception of the classical North American and European aesthetic for which they seem to have a particular fondness (45% as opposed to the average of 36%). This does not, however, mean that friends of museums can be described as having conservative tastes, since, like the survey average, their greatest preference is for the contemporary North American and European aesthetic. Only the few respondents from the auction houses express a strong preference for classical works, but the sample is so small that the difference is not meaningful.

Curiously, respondents referred by professional artists report lower-than-average preferences for works of a contemporary and classical aesthetic. They are above average for Asian and Black African aesthetics.

Table 5.26

Visual Arts – PREFERENCE FOR WORKS OF ART EXPRESSING THE AESTHETIC OF A PARTICULAR CULTURE

	AVERAGE	COMMERCIAL GALLERIES	FRIENDS OF MUSEUMS	PROFESSIONAL ARTISTS	ARTIST-RUN CENTRES	FAIRS	CRAFT GALLERIES	SHOPPING CENTRE GALLERIES	AUCTIONS
	%	%	%	%	%	%	%	%	%
Contemporary North American or European	58	62	58	55	58	52	55	44	48
Classical North American or European	36	37	45	27	31	40	41	33	55
Inuit	33	34	35	33	24	36	43	40	34
North American Indian	30	30	28	31	28	32	30	41	31
Japanese	23	23	19	24	23	31	24	22	21
Black African	17	14	15	21	21	20	20	13	10
Chinese	16	15	16	18	16	21	16	17	7
Other Asian cultures	12	9	11	17	15	15	7	11	7
South American	12	11	13	12	12	21	10	5	14
Arab	6	5	5	7	8	6	5	5	10
No opinion	5	4	5	3	7	9	2	5	3
Others	4	4	4	6	4	1	2	6	3

Artist-run centre respondents are at the average in terms of the contemporary aesthetic, under the average for the classical, North American Indian and Inuit aesthetics and above the average for Black African, Asian and Arab inspired works.

The fair respondents are eclectic. Under the average for the contemporary aesthetic, they are above the average for the classical aesthetic and considerably above the average for most other choices. Shopping centre galleries also seem to have a streak of eclecticism, as do, to a lesser extent, craft galleries.

It must be remembered, however, that these aesthetic preferences are those of the Canadian Arts Consumer Profile survey respondents, which means actual consumers or potential consumers referred by certain points of sale, and that this sample does not systematically represent the Canadian population.

5.3 Money

Buying a work of art obviously requires the expenditure of money, in small or considerable amounts. This section describes, first for the visual arts sample, then for the general public, the amounts respondents said they were prepared to pay, and would seriously consider paying in the future.

5.3.1 VALUE/PRICE IN THE VISUAL ARTS SAMPLE

Visual arts survey respondents acquire works of art whose prices may be analysed by point of sale, as shown in Table 5.22. In turn, Table 5.27 shows the percentage of respondents saying they are ready to pay a certain amount to acquire a work, by each type of visual arts product. The percentages are to be read horizontally.

Table 5.27

Visual Arts – AMOUNT PREPARED TO PAY FOR A WORK OF ART

	Less than $100	$100 to $499	$500 to $999	$1,000 to $4,999	$5,000 to $9,999	$10,000 to $24,999	$25,000 to $99,999	$100,000 or more	Total of answers	No opinion
	%	%	%	%	%	%	%	%	%	%
Original paintings	2	20	21	37	11	5	2	1	100	8
Original drawings	11	41	24	18	3	2	0	0	100	15
Original prints	13	45	22	16	2	1	0	0	100	15
Sculptures	9	26	21	30	9	3	1	1	100	18
Fine art photography	35	41	13	7	2	1	0	0	100	24
Original textile artwork	33	36	17	11	2	0	0	0	100	31
Video and other media art	72	19	5	2	1	0	0	0	100	43
Installations	64	15	7	9	3	1	0	1	100	45

The percentages for each type of product were calculated without the *No opinions*. The *No opinion* percentage are calculated on the total of respondents.

Original paintings are the works respondents expressing an opinion are ready to pay the most for: the five price categories superior to $1,000 gathered respectively, 37%, 11%, 5%, 2% and 1% of respondents. An important minority - four out of ten respondents - are prepared to pay less than $1,000 for a painting. The price ranges that respondents are prepared to pay for sculptures follow these same breakdowns as 44% are ready to pay more than $1,000 and as lower prices categories are also well represented (26% in the $100 to $499 and 21% between $500 to $999).

In terms of drawings and prints, which usually cost less, 23% and 19% report being prepared to pay more than $1,000. Purchase intentions for this type of art are grouped under $1,000, with strong 41% and 45% between $100 and $999.

The majority of respondents (76%) hope to buy fine art photographs for under $500 and one respondents out of five say they are ready to pay from $500 to $4,999. The willingness to pay for textile works reflects slightly lower prices than photographic works, however the percentage of *no opinion* increases from 24% to 31%.

For most video and other media art (91%) and installations (79%), respondents are prepared to pay less than $500; a small minority of respondents would pay more than $500, with 5% saying they would go higher than $5,000 for an installation. However, the basic non availability of these types of works in the "for sale" market place renders *prices prepared to pay* somewhat questionable. The high level of *no opinions* for these types of product may be related to this factor.

An overview of the breakdown of answers by type of point of sale provides the following indicators.

Commercial gallery respondents are most willing to pay the higher prices for almost all types of products, followed closely by friends of museums, particularly for drawings, prints and fine art photography. The margins of error notwithstanding, auction house

respondents seemed prepared to pay the highest amounts for paintings, sculptures, drawings, prints and textile works.

Respondents referred by professional artists are prepared to pay slightly less for paintings, sculptures, drawings and prints. They are top ranked in terms of photographic works, textiles, video art and installations. Artist-run centre respondents fall behind professional artists respondents, except for video art and installations, which achieve top levels of willingness to pay for a piece.

In craft galleries, the few respondents contacted say they are ready to pay slightly lower amounts than commercial gallery respondents for paintings, textiles, drawings and sculptures. However, they are willing to pay for video art, though the margins of error are high.

With the above mentioned margins of error, shopping centre gallery respondents are ranked considerably lower than the leading cluster (commercial galleries, friends of museums, professional artists) for all types of products.

Fair respondents are prepared to pay small amounts for all types of products.

Almost half the respondents (48%) say they considered buying a work of art in the preceding year and for various reasons did not.[1] This proportion does not vary significantly by points of sale.

The breakdown by type of product of the cost of contemplated but not purchased works of visual art is shown in Table 5.28.

Table 5.28

Visual Arts – COST OF CONTEMPLATED ARTWORK PURCHASES

	Less than $100	$100 to $499	$500 to $999	$1,000 to $4,999	$5,000 to $9,999	$10,000 to $24,999	$25,000 to $99,999	$100,000 or more	Total of answers	No opinion
	%	%	%	%	%	%	%	%	%	%
Original paintings	0	10	15	44	15	10	5	2	100	33
Original drawings	3	29	31	27	6	2	2	0	100	84
Original prints	2	29	30	31	3	5	0	1	100	79
Sculptures	2	13	16	38	15	12	4	1	100	78
Fine art photography	4	29	21	32	8	5	0	0	100	86
Original textile artwork	0	19	26	40	6	4	2	4	100	94
Video and other media art	13	50	0	25	0	0	0	13	100	99
Installations	19	6	6	44	19	6	0	0	100	98

The percentages for each type of products were calculated without the *No opinions*. The *No opinion* percentage are calculated on the total of respondents.

1 An open question, which was not analyzed in this initial analysis, allowed respondents to write in the reason for this non-purchase. Almost all respondents concerned (788 out of 816) wrote a response to this question.

The difference between the prices respondents state they are prepared to pay (Table 5.27) and the price they contemplated paying in the past (Table 5.28) is predictable: the amounts respondents say they are ready to pay are decidedly lower than those they considered paying.

Certain types of products make significant leaps toward higher price categories, particularly sculpture, which equals painting in percentages of respondents having contemplated a purchase above $5,000.

Installations realize an important increase for prices ranging from $1,000 to $9,999 (63%) and video and other media art for prices from $1,000 to $4,999 (25%). Again, these figures should be taken with a grain of salt, however, since the *no opinions* were both close to 100%, which leaves very few respondents who would consider paying such prices.

For most types of products, there seemed to be a wall in the $1,000 and $4,999 category, which received the highest rate of response for all types of products except drawings and video (which were rated second at that price level).

For drawings, prints and photographs, most non-purchases are found in the three price ranges from $100 to $4,999. Prices contemplated for textile works are in the same range, but with a higher upper limit. However, there were few intended but nonpurchased works of textile art (94% *no opinion*).

The comparison of both tables confirm that the cost of artworks is a constraint to purchase; the tables also indicate the price resistance level expressed by respondents for each type of product.

5.3.2 VALUE/PRICE IN THE GENERAL PUBLIC SAMPLE

General public respondents were also asked how much they would pay for a work of art, and not surprisingly, the average results, shown on the last line of Table 5.29, reveals a less expensive price range distribution than from visual arts survey respondents':

- 76% of the general public mention prices below $500, while from the visual arts survey, such prices engender 22% for paintings, 35% for sculptures and 52% for original drawings. The percentage of general public that would pay less than $500 for an artwork is comparable to the percentage of visual arts survey respondents that are prepared to pay similar prices for original prints, photographs and textile art.
- 17% of the general population would consider a higher price, as 11% would pay between $500 and $999, 5% considering $1,000 to $4,999 a maximum and 1%, $5,000 to $9,999. These price ranges were the preferred or reported amounts for the majority of visual arts survey respondents.

Nevertheless, that 44% and 11% of the general population, respectively, identify $100 to $499 and $500 to $999 as the maximum amount they are ready to pay for a work of art suggests that an important potential market exists for appropriately priced works.

Table 5.29

General Public – COST PAID AND WOULD PAY FOR A WORK OF ART

	Less than $ 25	$ 25 to $100	$100 to $499	$500 to $999	$1,000 to $4,999	$5,000 to $9,999	$10,000 or more	No opinion
	%	%	%	%	%	%	%	%
AMOUNT PAID, LAST PURCHASE								
Likely to purchase in next two years	13	31	40	9	5	0	0	2
Purchased last year	13	34	40	8	3	0	0	2
Purchased last 5 years	16	38	36	4	1	0	0	4
Not likely to purchase in the next two years	22	36	31	3	1	0	0	6
Average, general public survey	20	34	33	5	2	0	0	5
MAXIMUM AMOUNT WOULD PAY								
Likely to purchase in next two years	1	15	49	20	12	1	1	1
Purchased last year	1	18	50	17	9	1	1	3
Purchased last 5 years	3	20	50	15	7	1	0	5
Not likely to purchase in the next two years	10	27	43	9	3	0	0	9
Average, general public survey	8	25	44	11	4	0	0	8

The percentages include the *No opinions.*

Table 5.29 also indirectly provides interesting information about the positive effects of motivation. The respondents that reported different purchasing behaviour and intention to purchase, considered as distinct groups, report and say they are ready to pay different prices for a work of art. When ranking, those among the general public who say they are likely to purchase in the next two years are closer to the visual arts respondents in price paid for a work of art and price prepared to pay, as observed in the section on sociodemographic characteristics (Table 5.5). Those who purchased last year, those who purchased in the last five years and those who said they were not likely to purchase, differ more and more from visual arts survey respondents according to sociodemographic characteristics. They paid lower prices and say they would pay less for a work of art. The smaller price ranges gather more support from those reporting they were not likely to purchase, and less support from those who reported a purchase in the last five years, a purchase last year or their intention to purchase in the next two years.

Compared to the national average, twice as many likely-to-purchase respondents say they would pay $500 to $999 for a work of art (20%), and 12% say they would pay between $1,000 and $4,999, while the respondents that reported a purchase in the last year or last five years are also above the average. These distinctions suggest that $500 to $999 could be an acceptable entry price level for first purchases among an important minority of the intend-to-purchase general public. The same distinctions also indicate the existence of some general public acceptance for works of art priced between $1,000 and $4,999.

The amounts paid for the last purchase by general public respondents appear significantly lower than the maximum amount the same respondents would pay in the future,

taken globally or by comparing the type of purchase. Such differences may be due to the ease of wishful thinking versus actual purchase, and this interpretation calls for caution in attempting to obtain an ideal entry price level, which could be more in the vicinity of $500 than $1,000. It is also possible that a certain proportion of the respondents are in fact ready to pay such a price for a work of art, but that some reason prevented that from happening, such as not being exposed to the work of art at the right moment. Points of sale need to pay more attention to the value and price ranges of works in order to maximize the potential inherent in point of entry price ranges.

5.4 Context for Visual Arts Purchase

Marketing works of visual art implies understanding the process by and the context in which individuals purchase artworks. Did they make the decision on their own? Did they negotiate the price for the work? Are they interested in specific payment options, tempted to commission works, sensitive to the authenticity of the work, limited by time or space or affected by promotional information available?

5.4.1 CONSULTATIONS

Table 5.30 demonstrates the frequency, before purchase, of consultations with various persons by the purchaser him/herself.

Table 5.30

Visual Arts – PERSONS CONSULTED WHEN PURCHASING A WORK OF ART

	AVERAGE*	OFTEN %	OCCASIONALLY %	RARELY %	NEVER %	NO OPINION %
Art consultant	3.51	4	9	11	60	16
Decorator	3.85	1	2	7	73	17
The artist her/himself	2.13	29	34	13	14	10
Art teacher	3.44	4	11	13	56	16
Curator	3.05	8	21	15	41	15
Art critic	3.29	4	15	19	47	16
Art dealer	2.75	16	23	15	33	13
Friends/relatives	2.62	14	32	14	27	13
Other	3.64	2	1	1	25	70

* In the Average column, 1.00 corresponds to complete agreement with *often* and and 4.00 would correspond to complete agreement with *never*.

Few potential advisors are consulted, and even fewer are consulted indepth by the visual arts survey respondents, as is shown in the average, which for most survey responses is higher than three. Interior decorators, art consultants, art teachers, critics and curators are particularly not consulted and receive significant *never* responses, in addition to higher than average *no opinion* rates. The answer *other* received few responses.

Artists, dealers (read: responsible for a point of sale) and friends and relatives are the only sources of potential consultation to show an average higher than three. Consultation seems far from systematic: even when confronted with a choice that does not require a big commitment – *often* is not as absolute as *always* would have been – respondents are reluctant to choose a higher frequency: 29% for the artist, 16% for the

dealer and 14% for friends and family. Despite an average that shows a positive inclination to consultation, approximately three out of ten respondents note that they never consult dealers, friends or relatives either. Clearly visual arts purchasing is often an individual decision.

Table 5.31 illustrates, with the help of averages, the breakdown of the two individuals cited as consulted most often by respondents, according to the point of sale that referred them. The art consultant was added to the table, being the only other category of potential advisors that showed somewhat meaningful figures by point of sale.

Table 5.31

Visual Arts – PERSONS CONSULTED WHEN PURCHASING WORKS OF ART ACCORDING TO POINTS OF SALE

	VA AVERAGE*	COMMERCIAL GALLERIES	FRIENDS OF MUSEUMS	PROFESSIONAL ARTISTS	ARTIST-RUN CENTRES	FAIRS	CRAFT GALLERIES	SHOPPING CENTRE GALLERIES	AUCTIONS
	%	%	%	%	%	%	%	%	%
Artist	2.13	2.33	2.39	1.97	1.92	1.82	2.24	1.93	2.65
Art dealer	2.75	2.36	2.66	3.09	3.24	3.10	2.85	2.18	2.00
Art consultant	3.51	3.40	3.45	3.57	3.75	3.58	3.46	3.15	3.40

* Where 1 represents complete agreement with *very important* and 4 represents complete agreement with *not at all important*.

In all but two points of sale shown in Table 5.31, artists are cited as being consulted more frequently than arts dealers or art consultants. The exceptions are commercial galleries and auctions. In these two cases, those responsible for such operations may have, in the purchaser's opinion, a credibility that equals that of the artist for respondents from other points of sale. With the usual disclaimers, one notes that auction house respondents are the only ones to prefer consultation with the dealer rather than the artist.

The relatively low rate of consultation with art consultants drops with respondents referred by artist-run centres, and increases in the case of commercial galleries.

The purchase of a work of art is, for many, an individual, private decision. This is confirmed in Table 5.32, in which half the visual arts survey respondents say they make the decision to buy on their own, and 45% make it with their spouse. Fluctuations by type of point of sale suggest that independent decisions increase in cases where the artist is more accessible (professional artists and artist-run centres).

Table 5.32

Visual Arts – DECISION TO PURCHASE A WORK OF ART

	VA AVERAGE	COMMERCIAL GALLERIES	FRIENDS OF MUSEUMS	PROFESSIONAL ARTISTS	ARTIST-RUN CENTRES	FAIRS	CRAFT GALLERIES
	%	%	%	%	%	%	%
Yourself alone	50	43	47	59	58	54	45
Yourself and spouse/partner	45	52	51	33	37	41	50
Your spouse/partner alone	2	3	1	2	1	1	0
Other household member	1	1	0	1	1	1	2

5.4.2 NEGOTIATION

Most visual arts survey respondents never (32%) or rarely (27%) negotiate the price when they buy a work of art. A minority (9%) say they always negotiate.

Table 5.33

Visual Arts – TENDENCY TO NEGOTIATE PRICE WHEN PURCHASING ART WORK

	ALWAYS	SOMETIMES	RARELY	NEVER	NO OPINION
%	9	30	27	32	3

Few variations were observed for types of point of sale, but one was predictable: auction house respondents negotiate more often (21% always, 52% sometimes). On the other hand, it was surprising to note that the shopping centre and craft gallery respondents say they negotiate slightly more than average, although these points of sale could have a tendency to use set prices, like most retail outlets.

There was another surprise in the respondents referred by commercial galleries and respondents contacted through professional artists: both groups of respondents appears to negotiate only a little and are close to or at the average for all respondents on the matter. After the discussion groups and the meetings with representatives of the visual arts world held at the beginning of the mandate, researchers expected to find a higher frequency of negotiation in points of sale where individual contact with the client is the norm.

5.4.3 PAYMENT OPTIONS

Table 5.34 shows the reactions to various payment options that could affect respondents' interest in buying more. Significant and small minorities of respondents are not interested in these options. However, more than three out of ten respondents were interested in the possibility of spacing out payments, while two out of ten showed interest in paying with a piece from their collection and in the lease-to-buy option.

Table 5.34

Visual Arts – INTEREST IN PURCHASING ACCORDING TO DIFFERENT PAYMENT OPTIONS

	A LOT MORE	SOMEWHAT MORE	NO MORE	NO OPINION
	%	%	%	%
If you could pay over a period of time, for example, two years	30	26	40	4
If the gallery would accept a work of art from your collection as partial payment	19	24	51	6
If you could rent the work with an option to buy	19	30	46	5
If you could pay with your credit card	14	25	56	5

While the proportion expressing strong interest is not great and only approaches 30% in the case of payment over a two-year period, the data does indicate that this option does have some appeal. However, without negating the interest in improved payment options, the data suggests that it is a tool that is more appropriate for the development of new clients than for increasing the penetration of the current market, since respondents from the visual arts survey did not express great interest in payment options.

5.4.4 COMMISSIONING A WORK OF ART

An encouraging one in three respondents report having commissioned a work of art in the past. As Table 5.35 shows, variations by type of point of sale are low. However, respondents contacted through professional artists are below average, and respondents contacted through commercial galleries and friends of museums are above the visual arts survey average.

Table 5.35

Visual Arts – COMMISSIONED WORKS OF ART

	VA AVERAGE	COMMERCIAL GALLERIES	FRIENDS OF MUSEUMS	PROFESSIONAL ARTISTS	ARTIST-RUN CENTRES	FAIRS	CRAFT GALLERIES	SHOPPING CENTRE GALLERIES	AUCTIONS
	%	%	%	%	%	%	%	%	%
Yes	31	35	34	25	23	31	29	43	45
Respondents	1,672	595	150	261	352	140	82	63	29

When survey respondents are asked what price they would be willing to pay for a commissioned work, 14% say they would not commission a work and 11% express no opinion. Thus one respondent in four appears not to be interested in this type of transaction. This rate of refusal is low and suggests that there is a commissioning art market among respondents to the visual arts survey.

Few respondents (13%) say they are prepared to pay more than $5,000 for their commission and 17% say they would pay less than $500. More than half the respondents (44%) indicate amounts of $500 to $4,999 (17% from $500 to $999 and 27% from $1,000 to $4,999).

Fair and artist-run centre respondents tend to wish to spend lower amounts, while commercial galleries are above average for potential commissions of more than $1,000. These respondents are, in general, more interested in commissioning art. The 63 respondents from shopping centre galleries do indicate a definite interest in the commissioning of works of $500 to $999, with some of the highest results in these categories. This sample, however, is too small to give reliable extrapolations.

Higher percentages of respondents contacted through professional artists tend to be ready to spend larger amounts, while, paradoxically, expressing the greatest disinterest in commissions (37%). Nevertheless, the overall interest in commissioning work suggests there could be a market for artists and dealers willing to discuss the creation of work with purchasers.

5.4.5 AUTHENTICITY OF THE WORK

Are respondents concerned, when they consider buying a work, about the authenticity of the work desired, to the point of asking for a certificate? Typically not, as is shown in Table 5.36. Slightly more than one in four respondents always or sometimes asks for such a certificate. The *sometimes* and *never* make up three quarters of the responses.

Table 5.36

Visual Arts – CERTIFICATE OF AUTHENTICITY WHEN PURCHASING

	VA AVERAGE	COMMERCIAL GALLERIES	FRIENDS OF MUSEUMS	PROFESSIONAL ARTISTS	ARTIST-RUN CENTRES	FAIRS	CRAFT GALLERIES	SHOPPING CENTRES GALLERIES	AUCTIONS
	%	%	%	%	%	%	%		
Always	11	19	8	8	4	10	13	13	0
Most of the time	16	20	20	10	11	7	23	22	28
Sometimes	27	29	32	23	22	25	39	33	45
Never	40	27	35	50	60	50	23	28	28
No opinion	5	4	6	10	4	8	3	3	0
Respondent	1,508	550	133	222	324	120	70	60	29

Commercial gallery respondents show a greater concern for authenticity in the works they purchase, followed by craft and shopping centre galleries.

The opposite pattern is true for artist-run centres, fair and professional artist respondents (respectively 60%, 50% and 50% said *never*). The proximity of the artist in such situations could have a reassuring effect. The results suggest a high level of trust, but may also be related to the contemporary art focus of the Canadian visual arts market place.

5.4.6 GEOGRAPHY AND TIME

Table 5.37 suggests that most respondents have the impression that points of sale are less than 30 minutes from their homes, with professional galleries being by far the most accessible, followed by artist-run centres, then other exhibitions, fairs and craft fairs.

Table 5.37

Visual Arts – DISTANCE BETWEEN RESIDENCE AND POINTS OF SALE

	COMMERCIAL GALLERIES	ARTIST-RUN CENTRES	EXHIBITION OTHER THAN MUSEUM OR GALLERY	CRAFT SHOW/ FAIR
	%	%	%	%
Less than 10 min.	48	33	28	25
From 10 to 30 min.	41	40	45	45
From 30 min. to 1 hour	8	8	10	11
Over 1 hour	4	7	5	4
Don't know	1	8	8	9
No opinion	2	5	5	6

A small minority of respondents - about 15% - say they live more than 30 minutes from points of sale. The most revealing variations in this table come from the *don't know* and *no opinion* categories, where the rates are considerably lower for professional galleries than for the three other types of points of sale. This may suggest either a lack of visibility or the non-existence of the latter points of sale in certain areas, or most likely, that respondents truly feel they do have physical access to galleries.

Seventy-two percent (72%) of respondents say they buy art at any time of the year (Table 5.38). Among those expressing a preference, fall and winter receive more than twice the mentions spring and summer receive. This could be helpful for decisions about promotional activities.

There are few significant variations by point of sale, except for fair respondents, who register a slight preference for summer purchases (6% as opposed to 3%) and who are generally more likely to state a preference (only a 64% *no preference* compared to the average of 72%).

Table 5.38

Visual Arts PREFERRED SEASON FOR ART PURCHASING

	%
Autumn	9
Winter	8
Spring	4
Summer	3
No preference	72
No opinion	4
Respondents	1,672

Table 5.39

Visual Arts – PREFERRED PERIODS FOR VISITING POINTS OF SALE

	1ST CHOICE %	2ND CHOICE %	3RD CHOICE %
Monday	6	3	11
Tuesday	6	6	6
Wednesday	5	9	11
Thursday	6	10	17
Friday	7	16	28
Saturday	35	25	9
Sunday	18	28	14
No preference and no opinion	18	2	3
Respondents	1 672	1 672	1 672

There are greater variations in the ideal time when respondents wish to visit visual arts and crafts points of sale, looking at a typical week. Table 5.39 shows great interest in Saturday, followed by Sunday. If the second and third choices are included, Friday and Thursday are also preferred days. Note: more than two out of ten respondents say they have no preference, or express no opinion, which puts this group of indifferents midway between those who prefer Saturday and Sunday, and those who opt for Fridays and Thursdays. Clearly being open Sunday is relevant for points of sale in the visual arts.

Table 5.40, which restates the first choice results by type of point of sale, also shows the preferences in terms of the respondent's daily schedules.

One will note first that the early afternoon on the weekend (including Sunday) is the first choice for a good number of respondents, and particularly for those referred by points of sale that could be described as commercial (commercial galleries, shopping centre galleries, craft galleries and fairs). Curiously, weekend mornings interested 17% to 21% of commercial gallery, friends of museums, craft gallery and fair respondents. Three out of ten respondents did not express a preference for a weekend time. These observations provide opportunities for establishing the business hours of points of sale during the weekend, and again particularly on Sunday, since one in five respondents would prefer to visit such points of sale on Sunday.

During the week, the preferred hours are scattered throughout the day, with a certain preference (34%) for the afternoon. There are, however, significant variations with regard to visits after 6:00 p.m.: while the average is 13%, this time of day interests one in four professional gallery, artist-run centre, craft gallery and fair respondents.

After examining the sociodemographic characteristics of the visual arts survey respondents, it was concluded that buyers and potential buyers of art work, as well as their spouses, tend to be working and leading an active life, which is clearly reflected in why they are interested in a weekend day and a week night.

Table 5.40

Visual Arts – PREFERRED PERIOD TO VISIT POINTS OF SALE (FIRST CHOICE)

	VISUAL ARTS AVERAGE	COMMERCIAL GALLERIES	FRIENDS OF MUSEUMS	PROFESSIONAL ARTISTS	ARTIST-RUN CENTRES	FAIRS	CRAFT GALLERIES	SHOPPING CENTRE GALLERIES	AUCTIONS
	%	%	%	%	%	%	%	%	%
Days preferred									
Monday	6	4	6	9	7	4	5	3	10
Tuesday	6	6	7	9	5	6	5	6	0
Wednesday	5	3	7	6	6	3	2	6	3
Thursday	6	6	5	6	8	9	4	3	3
Friday	7	8	4	7	7	9	6	10	7
Saturday	35	38	33	28	32	39	40	35	41
Sunday	18	18	15	16	18	19	21	21	10
Time of day preferred weekdays									
Morning	13	11	13	13	8	14	10	11	7
Lunchtime	6	7	6	4	5	6	4	2	0
Early afternoon	17	19	17	23	20	16	16	29	17
Late afternoon	17	11	17	9	8	8	6	8	21
After 6 p.m.	13	23	13	12	23	27	28	17	21
No preference	27	25	27	35	30	25	29	30	24
No opinion	8	4	8	5	4	4	7	3	10
Time of day preferred weekends									
Morning	15	18	17	13	9	19	21	13	14
Lunchtime	2	2	4	2	2	4	0	2	10
Early afternoon	37	38	29	34	38	38	38	46	21
Late afternoon	9	9	8	10	12	10	4	6	10
After 6 p.m.	3	3	1	2	4	3	2	2	3
No preference	29	27	32	33	30	26	28	29	31
No opinion	5	4	9	6	5	2	7	3	10

5.4.7 Information

Chapter 2 demonstrated the type of use that the respondents to the visual arts survey make of print and electronic media. This section deals with these respondents' perception of their knowledge of exhibitions taking place in their region, as well as their level of satisfaction with the information available

Table 5.41 shows respondents' awareness of exhibitions taking place in their region, using the answer to the question *How aware are you of what is available to see in or near your community?*

Table 5.41

Visual Arts – AWARENESS OF EXHIBITIONS IN COMMUNITY

	COMMERCIAL	ARTIST-RUN CENTRE	CRAFT SHOW/ FAIR	EXHIBITION OTHER THAN IN A MUSEUM/ ART GALLERY	NATIONAL/ PROVINCIAL /REGIONAL MUSEUM	PROVINCIAL GALLERY	MUNICIPAL/ UNIVERSITY GALLERY
	%	%	%	%	%	%	%
Very aware	35	28	21	18	33	30	37
Somewhat aware	40	27	35	38	37	37	38
Not too aware	16	23	26	30	19	19	16
Not at all aware	5	17	14	9	7	8	5
No opinion	4	5	5	5	4	6	4
Average	1.92	2.30	2.34	2.32	2.01	2.05	1.89

Average: 1 represents absolute agreement with *very aware*, and 4 represents absolute agreement with *not at all aware.*

Although not exceptionally high, respondents feel their awareness of exhibitions is generally good for most points of sale or exhibition, and particularly for commercial galleries and the major museums.

Results for the two other points of sale show a lesser degree of comfort with the question: craft fairs receive the lowest rate of *very aware* (18%), and artist-run centres receive both 28% for *very aware* and 17% (the highest percentage) for *not at all aware*. Exhibitions shown in places other than galleries and museums also received a low average.

The rate of satisfaction in relation to information in the region with regard to exhibitions that interest the respondent is higher, on average, than affirmations of awareness. This suggests that, in general, respondents do not remember or have no impression of having missed seeing an interesting exhibition due to lack of information. Three out of four respondents say they are very or somewhat satisfied with the information available, and the rate of *no opinion* is negligible. The 24% who are less satisfied however, should not be dismissed: if a quarter of potential clients feel they are poorly informed, this does not augur well for developing a potential clientele.

Respondents referred by associations of friends of museums and professional galleries are the most satisfied, while those referred by professional artists provide the most lukewarm responses, particularly in the *very satisfied* and *not at all satisfied* categories.

Table 5.42

Visual Arts – SATISFACTION WITH INFORMATION AVAILABLE ON EXHIBITIONS BY POINT OF SALE

	VA AVERAGE	COMMERCIAL GALLERIES	FRIENDS OF MUSEUMS	PROFESSIONAL ARTISTS	ARTIST-RUN CENTRES	FAIRS	CRAFT GALLERIES	SHOPPING CENTRE GALLERIES	AUCTIONS
	%	%	%	%	%	%	%	%	%
Very satisfied	24	27	31	18	20	26	16	24	2
Somewhat satisfied	50	52	47	48	52	46	56	46	34
Not too satisfied	17	15	13	20	16	20	21	19	17
Not at all satisfied	7	4	5	11	10	5	6	8	14
No opinion	3	2	5	4	2	3	1	3	7
Average	2.07	1.97	1.90	2.24	2.15	2.04	2.17	2.11	2.19
Respondents	1,672	595	150	261	352	140	82	63	29

Average: 1 corresponds to complete agreement with *very satisfied* and 4 corresponds to complete agreement with *not at all satisfied*.

5.4.8 COLLECTION AND RESALE

The collector sees purchases in a different light than other buyers, since the new works are integrated into a whole and must follow a certain logic. This is not a negligible aspect since a large minority of respondents - three out of ten - identify themselves as collectors.

Respondents' collections are built, as is shown in Table 5.43, around varied constants. Artist-, style-, media- and culture-based collections interest a good minority of collectors. Periods, schools and themes are collected by a smaller minority of collectors.

Once again, the individual nature of the relationship to the work is visible in the lack of outside encouragement to become a collector: 86% of respondents say they decided themselves to become collectors.

Buyers do sometimes resell works: 36% of respondents say they have already resold a work.

Table 5.43

Visual Arts – COLLECTIONS

TYPES OF ARTWORK COLLECTED	
A particular artist	32
A particular school of art	12
A specific style of art	26
A specific period	14
Art of a particular culture	24
Works with a specific theme	11
Works done in a specific medium	25
ENCOURAGED TO BECOME A COLLECTOR BY	
Yourself	86
Friends/relatives	4
Artists	2
Art dealer	1
Others	5

As shown in Table 5.44, more respondents referred by professional artists have sold a work from their collection, which is also true, with the usual methodological disclaimers, for those referred by auction houses. Fewer respondents referred by friends of museums and fairs have done so.

Table 5.44

Visual Arts – SALE OF A WORK OF ART

	VA AVERAGE	COMMERCIAL GALLERIES	FRIENDS OF MUSEUMS	PROFESSIONAL ARTISTS	ARTIST-RUN CENTRES	FAIRS	CRAFT GALLERIES	SHOPPING CENTRE GALLERIES	AUCTIONS
	%	%	%	%	%	%	%	%	%
Yes	36	37	27	44	34	29	30	33	66
Respondents	1 672	595	150	261	352	140	82	63	29

The choice of answers proposed as reasons for selling works emphasizes, in financial terms, need rather than interest: thus, in first place, 36% say that needing money was a very important reason, while 10% speak of an opportunity to profit from the increased value of the investment. In second and third place, one respondent in five acknowledged the desire for a change and no longer liking a work as very important. However, these two reasons receive higher percentages of *not important*.

The need for space was fourth, and the sixth and final position, that the work no longer fit in with the decor, had a substantial 56% of respondents who said that reason was *not important*.

Chapter 6

Conclusions

Canadian artists and arts organizations already employ some or many of the strategies and methods advocated in this chapter and others not discussed. This final chapter does not pretend to systematically represent actual or potential practices in arts marketing, but is intended to help marketers use the newly available data on Canadian arts consumers and reflect on existing marketing practices. Finally, it may introduce new strategies to groups with limited available expertise, helping to develop greater knowledge of existing and potential audiences and purchasers.

1 STRATEGIES

The Canadian Arts Consumer Profile has been built on the working assumption that, regarding the arts, an individual will be either :

- an actual consumer with positive attitude and behaviour;
- a potential consumer with positive attitude but with behaviour yet to be realized; or
- a non-consumer with negative attitude.

As well, it has been assumed from the start of the research that distinct marketing strategies would be needed for arts market penetration and arts market development.

The results and analysis establish the applicability of this model and allow for a supplementary distinction in the original definition of three types of consumers: potential consumers are, indeed, not only those who have a positive attitude toward the arts but do not attend, but also those who attend or purchase less frequently. Far more numerous than expected, this second type of potential audience constitutes a substantial possibility for sales growth for arts organizations and artists.

The surprisingly large proportion of individuals that reported attendance at least one performance of some sort in the last six months (66%) establishes that a majority of the population is familiar with the performing arts.

The substantial percentage of the population reporting the purchase of works of visual arts in the past 12 months (24%), even at lower prices, reveals higher than expected levels of penetration of visual arts products.

Findings made it clear that the performing and visual arts, along with a reputation for excellence, and much intention to attend or purchase more, currently demonstrate good penetration among the general public.

Such findings suggest that three complementary strategies be implemented.

1.1 Frequent Attenders and Purchasers (Type I Consumers)

The first strategy, directed to frequent performing arts attenders and visual arts and craft purchasers, is based on the principle of **keeping current customers satisfied**. Arts organizations must maintain current levels of audience and purchaser behaviour through programming and inventory quality, aesthetic coherence and variety, improved service, facility improvements as required, and so on.

Increasing frequency of attendance may also be attempted for such audiences, although in lesser magnitude when one considers reported time and money constraints, and current levels of contentment with present frequency of attendance. However, there is some potential for capitalizing on the desire of most performing arts audience members to attend other types of products. It is not clear, however, if the end result would be overall growth in frequency or attendance transfer within the same time and money budgets.

It appears possible to increase arts organizations' earned income, particularly from faithful attenders and purchasers. For some performances types, prices might be adjusted to reflect better value. Artistic organizations might also offer more opportunities to become members, to volunteer and to donate, particularly to frequent attenders and purchasers, and particularly those belonging to the Devoted and Believers psychographic segments. Granting financial or, probably as efficient, symbolic rewards to those who bring in new customers, and particularly subscribers, may also bring improved results.

Specifically for the performing arts, one must assume that a fair proportion of frequent attenders are subscribers. Where they are not, subscription programs should be progressively implemented wherever possible and appropriate according to the type of product involved, competition and the general market situation. When typical subscription cannot be implemented, alternatives that allow the concretisation of attender loyalty should be developed. Similarly, visual arts points of sale must facilitate the development of loyalty on the part of visual arts and craft purchasers (invitations, regular information, promotions, memberships).

1.2 Occasional Attenders and Purchasers (Type I Consumers)

The second strategy is aimed at **increasing the attendance and purchasing behaviour of occasional consumers**. These customers are not newcomers; attitudinal and practical constraints do not affect them much, as they know how to get to the theatre or gallery, are familiar with the dress code, are aware of the expenditures involved and remember how good the experience was for them in the past.

The appropriate approach seems to be, rather than arts education, information for immediate action. These occasional consumers are familiar with the artistic product

and must be offered the possibility to repeat, then increase and eventually become loyal, finally commiting themselves to attendance and purchasing behaviour.

Subscription or comparable loyalty-oriented tools appear as obvious means to achieve such a goal. One might consider specially packaged and priced entry subscriptions with long term, multi-staged and personalized follow up.

Other means, particularly for consumers rejecting the idea of advance planning and commitment, are also to be considered. This segment of the population appears to be quite susceptible to react positively to simple, "buy now," date-place-price approaches transmitted through mass/media (TV, radio, newspapers) and other conventional advertising such as posters and billboards.

Considering expense, targeted methods may be more affordable, and in some cases more cost efficient, such as the use of specialized magazines or newspapers, postal-code area targeted flyer distribution and personal contact through an organization's volunteers. Direct mail and telemarketing, although seemingly more expensive than some mass media, may also be proven more cost efficient, especially with regards to the marketing of specialized types of products to well targeted potential clienteles.

Finally, some arts products, such as avant-garde types, choral music, country, folk, most visual arts products and even opera and ballet, currently possess limited, but relatively homogeneous, markets. Present customers could, as suggested for the preceeding strategy, be used as a vehicle by which to increase attendance or purchase by more occasional clients within the same networks of people.

One out of two respondents to the festivals questionaire reported they were not previously familiar with the type of performance they attended. This suggests that such events bear substantial potential for attracting occasional audiences and for increasing attendance. This is not to say that the mere fact of attending an unknown type of performance once in a easy going summer setting will suffice to transform the festival attender into an audience for regular performances. Marketers must also apply loyalty building techniques to festival attendance, such as lists of names and addresses, tickets and subscriptions introductory offers, similar in-season progamming, etc. Alliances and long-term planning between festival organizers and local presenters and producers could also help to create increased awareness for certain types of products.

For visual arts and crafts, occasional and potential purchasers present a specific challenge as most of them probably purchase their artwork outside of the traditional network of commercial galleries, artist-run centres and professional artists. It is also most probable that they purchase works of different aesthetic, values and prices than those sold, for example, in commercial galleries.

The facility or point of sale may be an excellent place of advertisement for upcoming programming and a source of names, addresses and phones numbers with which to work. Every organization must, as much as possible, keep track of each client's attendance and purchasing history, as conversion from occasional single ticket buyer to full subscriber may take several years.

1.3 Non-Attenders and Purchasers (Type II and III Consumers)

The third strategy is intended to **bring to performing arts attendance and visual arts and craft purchasing behaviour individuals with no such behaviour**. Aimed at those with a positive attitude toward the arts or a certain artistic product, this strategy might also entice some individuals who expressed no attending or purchasing behaviour and a negative attitude toward the arts (Type III consumers).

Technically, these potential customers can be reached by much the same methods as has been already suggested. However, the content of the message the marketer transmits may change significantly, as the non-consumers are not as familiar with the context of the performing or visual arts, and might feel insecure about their lack of knowledge. To overcome this insecurity, potential consumers from this group need to be given two important pieces of information that, in most cases, the current attender or purchaser would consider obvious:

- What will the overall experience be, and why would they appreciate it. Such information is intended to assuage attendance or purchasing motivation-related insecurity.
- How to do it. Even more than the usual date-place-price information, practical information must be transmitted about the location (area, highway exit number, bus routes, subway station, parking), the setting, the dress code and the expected behaviour and traditions. This information is intended to alleviate the potential customer's insecurity about the constraints of attendance or purchasing.

Such information will not easily be transmitted in one, short and simple message; moreover, information transmission will not be enough to open a market to new consumers, as the individuals of Type II are the most subject to maintain their non-behaviour if they face constraints. An arts organization deciding to develop a new market in this direction must train its staff and adapt its communications to the concept that new audiences are also new to their activities.

Clearly, mass-media, targeted tools and personal approaches may be appropriate, depending on the circumstances, while price, always important, appears crucial for these potential consumers. Price is one of the most important constraints, particularly before deciding to undertake a new experience. Entry prices must be carefully established and offered through targeted direct mail, telemarketing, promotional campaigns, current customers, purchase or exchange of mailing lists, etc. Free good tickets might also be distributed through radio and other media contests in exchange for names, addresses and phone numbers of participants. However, caution must be exercised against overuse of free tickets, as paying for the artistic experience is an important part of the behaviour which the marketer aims to develop.

Festivals also have some potential to attract new attenders, although this seems more risk involved. On the one hand, some festivals present works, productions and companies that are out of the ordinary. On the other hand, some festivals offer performances of popular and accessible productions in unusual settings, often free or at

reduced prices. In both cases, the product offered through festival programming may be very different from regular, in-season programming. The same applies to the visual arts and craft in the context of fairs, blockbuster exhibits and popular events.

Getting to the parent via activities offered to their children, family oriented activities that bring parents and children together at the facility, and special programming for newcomers might also be attempted.

A word of caution about the two latter possibilities: the integrity of the works currently presented by the company, gallery, presenter or artist must be maintained in such a process, (aesthetics, repertoire, style and artistic vision). The conditions of presentation must also remain the same. Market development must avoid creating any misunderstanding about the real nature of the product sold – for example, a symphonic music concert from a classical series in a specific facility, or a painting by this artist from that commercial art gallery – and provide to the potential consumer an experience as close as possible to what will be presented if he or she buys a ticket or purchases the artwork. Similarly, audience development for people with children could include kindtergarden or childcare services, special prices and special curtain time.

In the visual arts and crafts, the occasional and potential purchasers include the 24% of the general public survey respondents who reported a purchase in the last 12 months. They belong to this third strategy and present a specific challenge, because most of them appear to purchase their artwork outside the traditional network of commercial galleries, artist-run centres and professional artists. Again, it may well be that they purchase works of different aesthetics, values and prices than those sold, for example, in commercial galleries and artist-run centres.

As for the performing arts, the third strategy for visual arts and crafts aims to bring potential consumers to new points of sale; however, the task may rather be to bring the products to the clients, philosophically if not materially speaking. Philosophically, in the sense that for a large proportion of this potential clientele, art they purchase or covet might differ from the art offered by commercial galleries/artist-run centres/professional artists; materially, as these individuals might not consider the latter points of sales as the place to purchase their artworks.

The arts marketer may need a special approach to convert a certain segment of potential consumers: they have the desired positive attitude toward the arts, but they are at-home people and tend not to go out. The decision logic of such an individual will probably be:

- to go out or not to go out;
- to go out to an artistic activity or to any other (friends, bingo, sport, shopping);
- to choose this or that type of artistic product, probably based on some assumed aesthetic or symbolic value;
- finally, to choose the specific performance or work of art.

Before deciding to attend a specific performance such as Hamlet, Carbone 14, Blue Rodeo or Les Grands Ballets Canadiens, the idea of going out has to be established. This can be achieved through better alliances with non-arts partners, as the first ticket purchased will be used in a bus, a subway or parking, and the evening out could include eating in a restaurant.

Finally, it is a particularly difficult challenge to bring to theatres and galleries individuals who have never previously attended such places and do not express the intention to go (Type III). Hits, stars and special occasions may work; however, in the long term, it may be more advisable to go directly to the children of the non-interested and make sure that they will be offered the opportunity to discover and appreciate art, an opportunity that their parents are likely not to provide them.

Potential customers not familiar with the world of art must be invited to a guaranteed "no risk" road test. The task of arts organizations and arts marketers is subsequently to take care of these explorers, obtain their names, and enlist them.

1.4 Selling the Experience

The three suggested strategies synthesize the challenges facing arts marketers. Tactics, methods and tools to concretise these strategies will vary according to types of products, regions and even individual companies or marketers. The Profile may help to choose the most cost efficient and productive solutions. The Profile may also provide marketers with insights for communications content and style, and suggest the values best suited for each type of product's unique particularities.

Generally speaking, and without addressing specific questions such as advertising aesthetics and messages, what are the arts marketers selling? Or, to reverse the question, from the attender's or purchaser's point of view, what is to be attended to or purchased?

The same work of art, the same performance, with its own aesthetics and artistic vision, may be presented and perceived, in some cases simultaneously, as different objects to diverse segments of the clientele. The arts marketer could sell, for example, a theatre play as theatre, art as reflecting the values of society, entertainment or an evening out:

- The frequent theatregoer will buy the play itself, and what is special about the production : its author, director, actors, sets, etc.
- Those having a positive attitude toward the arts and a lesser knowledge of theatre will buy an artistic experience with its related artistic and societal values or the theme of the work.
- Others will buy entertainment, understood not to include an existential experience, but rather a high quality performance in a professional setting and safe environment.
- Finally, some will buy an evening out, a change from the usual, something to mark or celebrate a special occasion.

The same would apply to a work of visual art, as the work itself may motivate a frequent purchaser while the artistic and societal values related to the artwork will touch those having a positive attitude toward the arts; similarly, other individual will be interested in the contribution of the work to the decor of their home or will purchase it to commemorate a special event.

Efficient marketing of arts products requires a clear understanding of what is sold, as well as of what is bought.

2 PERFORMING ARTS

The performing arts are a fertile ground for the second strategy (increasing the attendance and purchasing behaviour of occasional consumers), as occasional consumers are numerous and relatively easy to get in touch with, and as loyalty building techniques are less costly and well known to the performing arts community. Most organizations possessing a minimum level of stability can attempt such practices.

However, no arts organization, whatever its size, can afford to lose faithful and frequent consumers because of poor quality customer service or any similar reason. Neglecting the first strategy (keeping current customers satisfied) is not advisable.

Stronger organizations, those having the capacity for working on mid- and long-term goals, will profit from investing some resources in "third strategy" oriented actions (bring to performing arts attendance and visual arts and craft purchasing behaviour individuals with no such behaviour), possibly in consort with similar organizations in the same market.

2.1 Product

In thinking through the strategic marketing implications of the Canadian Arts Consumer Profile research, the researchers have been guided by one principle. In most sectors, if a product does not sell, one of the options of the producer is to examine the product and determine how the product can be altered to make it more acceptable for consumers. This is not normally an option for arts marketers. Performing and visual arts products are the result of artistic expression, and while they may be oriented to a particular market, they are a result of a creative act that would be falsified if it were deliberately produced to a pre-arranged formula that maximized appeal. Of the four P's of arts marketing, the Product variable is the artist's prerogative, not the arts'marketers.

The fact that two thirds of the general public report they attended either a Traditional or a Popular type of performance in the six months preceding the survey, and that two thirds also indicate an interest in attending more performances in an auditorium, suggests that the market for the performing arts is broad. The basic challenge, from this point of view is that audiences currently do not attend performances with sufficient frequency and when they do, they attend relatively few types. In particular, theatre is easily the dominant Traditional arts types, while pop/rock dominates among Popular performance types.

Interest in other types, however, is quite high in many instances. This is especially the case with symphonic music. However, most importantly, all types elicit interest in more frequent attendance.

The opportunity facing the performing arts is then more one of market penetration than market development. In other words, persuading the existing audience base to make good on their interest in attending more often. The challenge is not to persuade

audiences that the performing arts represent a worthwhile experience, as many already accept this in principle.

As the appropriate orientation and interest in the performing arts already exists, a further challenge is that of persuading audiences of one particular type to attend performances at another. The evidence in the surveys is very clear that audiences are, in general, prepared to do this.

The implication for arts marketers is that arousing the interest of potential audiences is a secondary issue, since this interest already seems to exist in large measure for many performance types, but to make it easier for potential audiences to become paying customers.

In part, arts marketers must reach those who are already audiences for other specific performing arts types. However, the first and easiest audience to reach is each type's own audience. All the data point to the fact that interest in attending more frequently is greatest among those who are part of an existing audience base. This audience also constitutes the easiest and most cost efficient to reach.

There is also extensive evidence in the surveys that audiences attend both Traditional and Popular performances, and that new audiences for specific performance types can be found not only among other Traditional performance types, but also among Popular performance types. Arts marketers must therefore begin to consider more opportunities whereby potential cross-over audiences are facilitated, and their interest serviced in the process of the actual purchase of tickets.

As noted above, some performance types have very high current levels of reported attendance, others relatively low levels of attendance, although availability is often a determining factor. Drama and comedy and to a lesser extent symphonic music, are examples of the former, while contemporary dance, experimental theatre, contemporary classical music, chamber/soloists, opera and choral performances are examples of less frequently attended types. The latter may need significantly more promotion than others, and in some cases, improved availability and improved conditions of presentation.

The indication that there is something of an avant-garde audience, who are attracted to innovation and value the arts in a somewhat different way than most audiences, suggests that this audience should be marketed to as one unique segment and that joint marketing ventures should be collectively initiated by avant-garde companies of every discipline.

2.2 Place

2.2.1 Facility and Customer Service

If the prime challenge for marketers is to reach out to a somewhat familiar audience rather than to focus on bringing to the product a completely new audience, then issues related to the quality of the facility are important factors in audiences' decision to attend more frequently or in limiting their attendance.

The evidence for the importance of the facility in influencing purchase decisions is derived from the fact that over half the general public (56%) and audience (56%) report that the facility in which a performance is taking place has influenced their decision to attend either frequently or occasionally. This suggests that the facility can be a positive in marketing efforts, or a negative. Most audiences indicated that facilities had influenced their purchase decision in both ways.

In terms of what seems to be important about facilities for the public, the view of the stage from the seat, and the quality of the sound are especially important, but in addition, the comfort of seating, cleanliness of the hall, ease of parking and washrooms are all cited as being of some importance.

Given that these items are the ones taken to be important in decision making, some of these items received relatively lukewarm evaluations from currently attending audiences. In particular, ease of parking, the lobby, the washrooms and the comfort of seating are evaluated relatively poorly.

The correspondence between on one hand facility volume, design and technical equipment and on the other hand the physical and technical requirements of every type of performing arts product also contribute to the quality of the attender experience.

The implication here is that audiences are buying a total experience and if part of that experience is less than exceptional, then they may not enjoy or want to repeat the experience. Moreover, given that most other sectors of the economy have been focusing on the issue of customer responsiveness and customer attentiveness, then this also raises public and audience expectations for other areas of their lives where they consider customer services. The performing arts, in all probability, fits into the public mind on one level as a service. The challenge for the arts organizations is to respond to a changing public mindset regarding service by becoming as equally customer service driven as other service sectors of the economy, at least in the delivery of quality artistic product.

This has numerous implications. One complaint identified in the research regards lobbies, which may be juxtaposed to the predisposition to buy tickets through the box office. Possibly, audiences find the lobby inhospitable, possibly they are put off by the ticket wicket. On this issue, the wicket is an excellent example of the need to be more service oriented. At present, many ticket wickets resemble those of old style banks, in that they appear to be designed to be a barrier between the public and the facility, and

ultimately the performance. Just as banks have moved to a very open concept for the tellers' counter, a similar approach in the performing arts may send a message to audiences of more approachability and openness. This also suggests that companies and facilities have an opportunity to help shape a good first impression at the ticket-purchasing stage.

Another issue relating to the evaluation of facilities is parking. In order to deal with this irritant, it may be possible for facilities to book parking for audiences when they purchase a ticket. This would certainly be feasible in large urban downtown areas with lots of underground office parking available in the evenings. An additional charge could be added to the bill for parking and possibly reduced rates could be offered, as facilities should be able to negotiate excellent rates from local car parks, in off peak hours. In any case, to deal with the parking issue via service to the customer seems to be essential.

Washrooms are also evaluated relatively negatively, especially by women. The most likely reason for this is that insufficient women's washrooms are available in most performing arts facilities. Increasing the number of washrooms for women would again improve the experience. Relating well to women in the audience is particularly important because of the large number of women that make up the Traditional performing arts audience.

A further issue regarding responsiveness concerns the return of tickets. Virtually no one in the audience survey or among the public accepts that tickets cannot be returned if a person cannot attend a performance. The preferred option when this occurs is that tickets be returned and exchanged for another performance. Such an approach, or any other similar way of addressing this customer service issue, would again send out the message that performing arts groups and facilities want to be responsive to the public.

Although no questions were asked about ushers, if a commitment to quality service and a first class experience is to be made, then training of ushers in customer service techniques will certainly be required. The same principle applies to all other staff that come into contact with the audience, from the box office to the custodial support staff.

Audiences and the public expressed some interest in purchasing tickets by phone. Identifying current barriers to telephone customer service and purchasing, and encouraging better use of this customer service is also part of a customer oriented approach.

In addition, extensive interest was generated by the idea of purchasing tickets through automatic teller machines, and through purchasing at home using television to show seating plans and the phone to undertake the transaction. While these ideas cannot be undertaken by one company or facility, they could be undertaken by a consortium of arts organizations.

Another idea that received extensive support, and might be easily carried out, either by a consortium of companies or alone, is that of a frequent attender program, in which points toward free tickets are earned each time tickets are purchased.

Given the potential for ancillary revenue through improved beverage service in the lobby, producers and presenters must address the basic audiences' frustration, presumably due to their inability to obtain refreshment before the performance and during the intermission. Floating beverage wagons, better organized permanent refreshment counters and improved quality service may be considered. The service at such outlets must also be informal and friendly.

Finally there appears to be customer service potential through improved use of the relatively popular house program. More advertising for performing arts events would encourage attendance. Advertisements could be sold at reduced rates for not-for-profit cultural sector colleagues, in addition to current advertising, thereby adding also to these ancillary revenues.

2.2.2 THE SETTING

A number of the agree/disagree statements suggest that Canadians generally prefer to attend performances where they do not have to dress up, and that they also prefer to attend performances where they can feel at home and relax. These feelings appear to be fairly widespread, and the two core psychographic segments - the Devoted and Believers - share these perceptions with other segments. At the same time, while these core segments appear comfortable with *the people who go to shows, like ballet and opera,* other segments are less comfortable.

The implication is that the somewhat formal setting of some performances of Traditional types may be limiting audience participation, by creating a barrier to attendance. From this point of view, consideration should be given to methods by which the atmosphere at a performance can be made more casual, relaxing and homey. Perhaps the ushers can be more colourfully dressed, bartenders given more friendly than formal uniforms, and the tone of staff relating to customers made more friendly and outgoing, etc.

2.2.3 SCHEDULING

The public expressed a clear preference for attending performances on either Friday or Saturday night. While it is impossible to only schedule performances on these days, they are clearly the days of highest demand. This suggests that either the nights of high demand can be priced differently from weeknight performances or weeknight performances can be sold at a discount. Possibly a low cost Wednesday program could be put into place, much the same way movie theatres have assigned Tuesday as their bargain day for low price tickets. As well, the performing arts that are more challenging to sell should be scheduled on weekends rather than weeknights.

The evidence on the timing of performances suggests that audiences prefer performances to begin no later than 8:00 p.m., and that while a plurality (41%) prefer 8:00 p.m., a substantial minority prefer 7:30 p.m. (26%) or 7:00 p.m. (21%). Clearly the 8:30 p.m. curtain has been rejected.

However, the ideal show time may vary in some zones, and for certain types of products. Competition may also play a role in determining certain performance time choices.

2.2.4 GEOGRAPHY AND SUPPLY

A recent study[1] has mentioned the possibility that there is too much offered in the performing arts related to the demand. This situation is not obvious when considering the market. To the contrary, the Profile's inventory suggests that the supply of performances in professional conditions is scarce or absent for certain types of products or in some zones. It seems that for a large number of producing companies (a number which may lead to the belief of an over-supply), only a few actually are able to produce in the market under professional presenting conditions.

In many parts of the country, while demand appears to exist, supply appears to be somewhat limited. This is especially the case in smaller communities and in the Atlantic provinces and New Brunswick. Clearly, finding ways to meet demand through tours is one option for companies and presenters.

There is also some suggestion in the data that limited supply has an impact on interest. Those parts of the country where supply is limited also tend to be the areas where demand, although it exists, is weakest. The implication here is that performances themselves help to build demand. This suggests that touring should be viewed as long-term audience development.

Rather than one-time circuits for specific companies, tours could be planned as coherent seasons offered to certain communities, bringing to them over a period of years, performances of high artistic quality chosen from various types of products, repertoires and companies, with a view to developing an audience. Because of the need to undertake audience development work, which may take a number of years to bear fruit, great care should be given to planning, as well as sufficient marketing budgets. Development projects, aimed at geographical areas that have not regularly received performances in the past, should be given greater attention.

2.3 Price

2.3.1 SINGLE TICKETS

The single largest barrier to more frequent attendance, and to attendance generally, is price. The same can be said of purchasing works of art.

There appear to be two challenges. First among core audiences, there does not appear to be that much resistance to the price being paid, and in fact, audiences appear willing to pay a little more. However, given that even among the Devoted and Believer segments

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1 Étude sur le financement des arts et de la culture au Québec, André Coupet and others, Samson Belair/Deloitte & Touche for the ministere des Affaires culturelles du Québec, November 1990.

there is evidence that they would attend more frequently if they could afford to, price does appear to act as a barrier to more frequent attendance even among the core audience. This suggests that encouraging attendance through discounts for frequent attendance might be a viable way of persuading audiences to attend even more frequently. Again, the "frequent flyer points" attender idea might be one such opportuniy.

The second challenge is to draw in the audience that attends less frequently. And it is among this group that the price barrier appears to be greatest. Throughout the data there is consistent evidence that those who are most interested in a particular performance type and those who attend most frequently are prepared to pay more for their tickets. This suggests that prices need to be made low enough for the infrequent attender to entice them to attend and to encourage them to become a more frequent attender, at which point they will be prepared to pay more for a ticket.

One pricing strategy that might be adopted is to have a much broader range of ticket prices, such that some seats are quite inexpensive. Another would be to have introductory offers for new members of the audience that would involve inexpensive seats.

2.3.2 SUBSCRIPTION

Subscriptions have a substantial impact on frequency of attendance. The lower frequency of attendance at ballet as distinct from theatre and especially symphonic music, in part, has to do with the lower level of subscription for ballet relative to the other two performance types.

There appears to be a number of barriers to increased use of subscription tickets. The two major ones are choice and price. In terms of choice, the issue appears to be the limitation regarding what and where to attend and, related to this, the inability to exchange unused tickets or attend alternate nights. The high cost of subscription series appears to be the main price issue.

In view of the choice barrier, some consideration should be given to providing more choice and flexibility, certainly in relation to an exchange policy. There also appears to be considerable interest in packages of mixed performance types. Given the high level of attendance at theatre, some linkage of other performance types with theatre could prove useful.

In many ways, companies develop an audience through subscription series. Making it easy and attractive for audiences to become subscribers would appear to be an important goal, perhaps through improved special introductory offers for new subscribers, which feature greatly reduced prices and enhanced choice options.

The rate of subscription sales might well be increased by providing convenient opportunities for purchase. For instance, an optimal time and venue would be directly after a performance when the attender is still "under the influence" of a pleasurable experience. Booths set up to sell subscriptions or to arrange for a follow up phone call might be quite successful.

Selling subscription is one thing, but retaining subscribers is another challenge. The service oriented approach that is suggested for the performing arts facilities also applies to customer contact throughout the year. Thank you cards to subscribers, a small gift thanking a subscriber for loyalty at the time of sending out renewal letters, such approaches tell audiences that they are appreciated. Similarly, sending subscribers a regular newsletter that includes additional notes about upcoming performances also helps to forge the relationship between subscribers and company.

The key to retaining subscribers is relationship building, which is already practised by many arts organizations, but which needs constant nurturing.

2.3.3 OTHER PRICING ISSUES

What are audiences purchasing? Can they be induced to give it a higher value?

The research points to the fact that audiences are buying the opportunity to enter a world that enables them to forget their cares and troubles, to relax and be entertained and to come away from the performance "feeling good." From this point of view, television and the movies would appear to be the main competition.

However, it is also clear that going to a performance is something of an event, that it is planned for, and that audiences like to make a special occasion of the evening. This implies that, as suggested earlier, some in the audience are purchasing an evening out and not just the performance. This means that being in the facility before the performance, the intermission, mingling with other audience members, the program, and any activity after the performance, are all being purchased when a ticket is bought.

If as suggested, part of the audience is purchasing first and foremost an evening out, in order to ensure that the experience will be repeated more frequently, all facets of this experience, and not just the performance per se, need to be taken into account.

A further consideration in terms of pricing is the relationship between price and the ability of the audience to pay. The demographics of attendance indicate that some types of performing arts have young audiences while others have older audiences. Those performances with younger audiences typically paid lower average prices for single tickets than those reported by older audiences. Presumably, those under 30 years of age may not have especially high incomes, and many, especially those under 25 years, may be students.

This suggests two implications. First, pricing strategies need to take into account the likely audience for a production. Second, audience development for some types of performing arts products where ticket prices are quite high is made more difficult, at least in terms of building young audiences to replace current older audiences, because of high ticket prices. This suggests that greater attention might be given to discounts for students and younger people, and that these be more actively promoted.

Much has been said about the high cost of outings (tickets, babysitters, drinks, restaurant meals, parking), particularly using examples like opera and musical's in urban centres. It must be remembered that most types of products in most zones have significantly lower ticket prices and outing costs than major productions in major centres. Such

lower costs are to the advantage of marketers and might be communicated to potential consumers.

2.4 Promotion

There are two very important sources of information about the performing arts. One is word of mouth: information obtained from friends, relatives, neighbours. The other is newspapers. In addition, audiences cite a wide variety of other media, including brochures, schedules, programs, radio advertising and features, and billboards and posters. The public, on the other hand, has less specialized sources of information available and instead relies on the mass media, including television, for finding out about performances.

When preferences are considered among the public, advertising through the major mass media are all cited as important, that is newspapers, radio and television, as well as word of mouth.

These results suggest a two-stage promotional approach is required for audience development, one that keeps in touch with existing patrons through brochures and schedules, and one that seeks to build new audiences through a greater use of daily newspaper, radio and television advertising. The fact that such notable hits as "Phantom of the Opera" and "Les Miserables" have, in some markets, successfully used all three mass media, suggests that the public in large markets, at least, are used to the idea of mass media advertising for performing arts products.

While television is clearly an expensive medium to use, it may be that companies can join forces to produce advertising that features a number of performance types productions, or possibly that corporate sponsors can be found for television advertising. A further reason for using television is that, given its use by musicals, commercial theatre and other types of Popular performing arts products, to not use advertising puts Traditional performing arts at a competitive disadvantage.

The importance of newspapers suggests that this is a media that also should be more extensively used by companies. It was the most frequently cited, after word of mouth, as a source of information. Moreover, audiences, especially, but also the general public, cite frequent readership of newspapers, as well as readership of the arts/entertainment section of newspapers and the reading of critics and reviews.

Newspaper advertising can also be important in terms of the needs audiences and public identify as the most significant information required about a performance. The fact that place, time and date are well ahead of other information needs, again reinforces the use of newspaper advertising to get this information out.

From a strategic marketing point of view, television and newspapers can be used in traditional marketing combinations. The role of television is to provoke interest and newspaper advertising then is able to close the sale by providing information about ticket purchasing and price.

Radio can also be used in the "provoking interest" stage in much the way television can. Given the fact that audiences and public have wide-ranging musical interests, for radio advertising, matching the potential audience to a particular music formats will, of course, need to be done.

Another option for increasing market penetration is to use house programs much more for promoting performances. This will only work effectively, however, if companies can advertise in each others' programs, perhaps at reduced rates.

It is clear from the research that while promotion is not the only answer to successful marketing, it is one of the key ingredients. The task of increasing audiences for the performing arts cannot be done without increasing promotional budgets.

While admittedly increasing budgets for promotional purposes in the current economy may present difficulties, there are other ways that budgets can be found, at least for some types, such as partnership with other performing arts companies, with other arts product related companies such as record companies, or with souvenir merchandising manufacturers.

2.5 Positioning

2.5.1 Repositioning the Performing Arts

It is clear that audiences enjoy the performances that they attend and that the images that Canadians create and retain about the performing arts likely involve a wide variety of factors beyond the performance. At the very least, these involve ideas about the arts, perceptions relating to the kind of people who go to performing arts events, childhood experiences, and perceptions relating to facilities.

Some of these factors appear to act as barriers to market penetration and development, while others act as facilitators. As noted earlier, the desire for a relaxed, casual atmosphere or for an evening out suggests that overall, impressions of the Traditional performing arts, for most segments outside of the Devoted and Believers, are not consistent with this desire. Ways must be found to make the Traditional performing arts appear more approachable. Some of the ways this can be achieved have already been discussed, in terms of a strong commitment to customer service and responsiveness, and to creating an inviting, friendly, approachable environment. Such an orientation should carry over to promotion also, in that advertising and other promotional material should convey a sense of being approachable and "for everyone". In essence, this is a call for the democratization of the availability of the performing arts and the creation of a feeling that no one is being excluded.

Expectations of Traditional audiences in broad terms are very similar to expectations of audiences generally. At the most basic level audiences want an experience that will take them out of themselves and give them a few hours respite from the world and leave them with a good feeling. When this is the case, promotional material should try to convey that this will be delivered.

At the same time, each type has its own unique attraction that needs to be promoted. For ballet, for example, the skill of dancers appears to be very important to audiences as a selling point. Among classical music audiences it does not appear to be a particular piece of music or soloist or conductor, but more importantly a love of the music.

Finally, the clearest statement of all is that both the general public and the audience consider *the piece being performed* as the most important factor affecting their decision to attend. It is essential that excitement about the excellence of artistic work be better conveyed to people willing to increase attendance or go for the first time.

3 VISUAL ARTS

When choosing the best marketing strategies to apply, the visual arts present a different picture from their performing arts counterpart.

Works of visual arts and crafts were reported purchased by visual arts survey respondents and the general public. One cannot be sure the same works of art and crafts are being purchased, but it is certain that different prices are paid, and, from the point of view of sociodemographic characteristics, that a large proportion of general public purchasers do not frequent typical visual arts and crafts points of sale.

This would suggest the need for two approaches, one aimed at actual visual arts point of sales and current purchasers, and a second aimed at the general public purchasers and non-purchasers.

For the actual points of sale, and generally speaking, for the works sold through the production, distribution and marketing infrastructure as usually understood, the first strategy (keeping current customers satisfied) and second strategy (increasing the attendance and purchasing behaviour of occasional consumers) seem the most likely to apply .

For the general public and perhaps also for the artists that could reach out to these potential markets, a variation of the third strategy is required (bring to visual arts and crafts purchasing behaviour individuals with no such behaviour).

3.1 Current Markets and Current Points of Sales

Commercial galleries, auction houses, professional artists and artist-run centres, with marginal variations, sell unique or almost unique works of art in small quantities to a limited and, in the majority, a sophisticated clientele, on most occasions at reported prices higher than $500. Every transaction is very important, both for the artist, the dealer and the purchaser. It is a market segmented by aesthetic styles and geography, where codes, assessing the symbolic value of the object to be purchased, are essential. Linked to possession and passion, these codes appear to be highly personal, and accordingly, most transactions proceed on a person-to-person basis.

Visual arts points of sale seem relatively passive in their marketing, as if waiting for well informed consumers to purchase, rather than selling the experience attached to the loving and possessing of a work of art.

The current visual arts market, comprising converted and relatively faithful consumers, has to be maintained. Some growth potential is, however, achievable through increased penetration and some market development.

3.1.1 Maintaining the Clientele

The maintaining of the specialized and relatively impermeable visual arts market will ensue from continuing current sales processes and from improving service to customers.

No major complaints were observed that call for immediate overall changes to the way visual arts points of sale operate. It must however be said that if visitors to points of sale were unhappy with some aspect of service, setting or any other item, they could well not be appearing on the surveyed points of sale mailing lists. Generally speaking, improvements in customer service are likely to improve sales, and the application of this principle will depend on each point of sale.

The opening schedule of operating hours, however, is an area of common interest for every point of sale, as respondents appears to obviously favour weekend afternoons to visit galleries and other visual arts and crafts points of sale. Wherever possible, visual arts products should be available on Sundays, and if not currently the case, Saturdays.

As for marketing tools, one must assume that, given the nature of transactions, the proper information about consumers and their history of purchase is kept by the sellers. The fact that purchasers collect or not – and if so, what do they collect – should be part of the data gathered from clientele, as one third of the visual arts respondents report being collectors. Generally speaking, any means of building lists of potential purchasers must also be pursued, especially if vernissage (openings) invitations and other mailings remain an important marketing tool.

Although various payment options received lukewarm interest from the current clientele, openness toward payment over a certain period, lending works, negotiation, exchanges and the acceptance of credit cards, could help to maintain, if not increase, actual sales levels. Potential consumers may also be encouraged by these customer services.

The two most important motivations for purchasing for visual arts survey respondents, *fell in love with it* and *want to enjoy it at home*, suggest that the purchase and ownership of an artwork provides a profound and personal satisfaction. This appears to be an effective argument that could be deployed by visual arts points of sale.

3.1.2 Growth potential

Within the actual visual arts market, significant growth will most probably come by facilitating the entry of new customers into the current circuit. Better advertised prices, a broader inventory and getting in touch with the potential consumer at the right moment, appear to be promising paths that could be explored further by art dealers.

Ultimately, these actions could increase the clientele base of the visual arts points of sale, increase their revenues and those of artists, and constitute a multi-staged approach to bring more purchasers to the more expensive works.

3.1.2.1 The First Purchase

Among others, three specific targets might provide a significant potential for market entry for purchasers of visual arts.

Individuals with sociodemographic characteristics similar to those of current consumers, but with lower incomes, could be reached more easily through the marketing of a wider inventory of quality artwork at more accessible prices.

Younger potential consumers could be sought through the marketing of photographs and prints. Invitations to selected exhibits might be organized through universities.

The months following moving into a new home is evidently a time for purchasing works of art. Reaching families or couples might be done through interior decorators, realtors, or simply by keeping track of newly built or sold houses and apartments. Associations are also possible with furniture retailers. Some municipalities distribute information packages to new citizens, and visual arts points of sale should be included in them. Considering that potential consumer tastes are generally quite specific, competition in a given market will play, in most cases, a relatively minor role between galleries and other points of sale with different inventories. Thus, a consortium of points of sale could approach people moving into new homes with invitations to visit them, offer a free print from within a choice based upon certain conditions; or invite them to participate in a draw for a valuable painting, again within a choice and price range that would be appropriate to the aesthetics of the new homeowners. This would also indicate to the consortium members the tastes of such non-consumers.

3.1.2.2 Prices

Points of sale might begin to encourage greater awareness of prices in general, as these somehow appears to be an "unmentionable." At times when occasional multi-million dollar sales of masterpieces are widely publicized, the concept of value of artwork is unbalanced and the existence of more affordable prices should be better known. The discretion currently practised by points of sale causes price points not to be used to their potential as marketing tools, and might result in sales losses from potential consumers willing to disburse smaller amounts for a unique work of art. The latter particularly applies to works of art available for less than $500, for which an important demand is observed.

Traditional points of sale have a reputation for quality and reliability, if one considers the low interest of visual arts respondents in obtaining certificates of authenticity. Points of sale should capitalize on this assumed reputation to alleviate potential consumer insecurity and gain new customers from outlets that sell symbolic objects that are not unique artworks. Putting emphasis on the affordability of artwork would also help.

3.1.2.3 The Inventory

Findings from the visual arts survey suggest that a broader inventory would facilitate purchases, and particularly the first purchase. Inventory could be broadened by merging into the mainstream inventory lower priced works featuring compatible aesthetics, and works of different media.

For example, photographs seem to attract slightly younger purchasers and prints, well accepted as authentic artworks, are typically less expensive; drawings also raised a significantly higher interest than reported purchases would indicate; some works of fine craft (jewelry, ceramics and glassworks) are as well the object of visual arts purchaser interest.

The commissioning of works of art could be seen as a service distinctly marketed by points of sale or by individual artists, with the result of increasing artist income and contributing to establish a long-term relationship between the potential consumer and a specific artist or a point of sale.

3.1.3 COMMENT

The current visual arts market seems to be a closed circuit where one must be introduced and progressively taught the language of use.

To do so, galleries and other points of sale might be marketed as value added compared to museums: not only will the visitor get an aesthetic experience, but it is possible to buy works of art or craft that come in a wide variety with varying prices.

3.2 The Potential Market

At a young age, humans experience passion and possession: children own toys, dolls and teddy bears, they collect marbles, hockey cards, and other things important to them; teenagers hang posters and magazine clippings on their walls, they collect stamps, coins, etc. When adult, some people transfer this double motivation to works of art, but in most cases, such transfers happen outside of the actual market for artwork.

Unlike attendance at the performing arts, the purchase of works of visual arts and crafts is not a widespread habit: as seen in the general public survey, two thirds of Canadians do not intend to purchase a work of art, and only a minority (7%) report purchases corresponding to the average visual arts survey respondents' price range ($500 and more).

Building a bridge to this potential market by current visual arts points of sale requires more than service to customers, loyalty oriented approaches and first purchase facilitation, and may be out of the reach of some points of sale.

The challenge may be emphasized in three ways:

- As many as 24% of Canadians purchased objects that they refer to as works of art, a majority costing less than $100; there is no proof that these objects were created and produced by Canadian artists, nor that they bear the values and aesthetics that relate to the various cultures of this country.
- Considering that there is a strong probability that many of these objects were not purchased in the current visual arts network of points of sale, it would seem appropriate that Canadians be offered the choice between such objects and works of art produced by Canadian artists.
- The general public survey indicated that 66% of Canadians are non-purchasers of works of art; to reach them constitutes a long-term challenge but one that must be addressed somehow.

Practical answers to such questions seem far beyond the scope of a marketing survey. However, the growth potential and eventual increase of artists' earned revenues are so important the issue must be addressed, at least in general terms.

Considering the nature of the current visual arts points of sale, Canada does not have a distribution network for works of art that allows extensive market development, no equivalent to the performing arts presenters network that bring various touring and locally produced performances to local audiences. Most Canadians encounter very few occasions to acquire works of art, particularly at the entry prices identified through the general public survey. Greater availability and promotion of lower priced works would contribute to the development of the visual arts market.

Specially priced works, including originial drawings, paintings and photographs, authenticated prints, reproductions and posters should be made more widely available. In one sense, greater official recognition by artists and arts dealers' community of the artistic value of such work would reassure the purchaser and help to open up the market.

The possibility for artists and points of sale to reduce prices with the objective of increasing sales is at least to be considered. However, the marketing of prints and high quality reproductions might also create the desired opening up of the market by establishing an intermediary price step toward the one-of-a-kind visual arts market. Series production would mean lower prices, larger distribution, and, through proper copyright protection and collection, higher revenues and reputation for the artists, as in the case for musical works where the creator of a unique work of art sees it being turned into a mechanically produced series of identical records. Reproduction technology, such as laser color printers, allows the making of reproductions of such quality paintings that they might provide the purchaser with, if not the satisfaction of owning an original work of art, at least the felicity of an emotive and aesthetic experience.

Points of sale, but also museums, public galleries, exhibit centres and other public spaces could intensify the sale of affordable prints and reproductions featuring the works of Canadian artists. Similarly, touring exhibits should allow the renting or purchasing of the works or of authorized and authenticated prints or reproductions. Other means of distributing these works of art by-products might also be identified.

After acquiring the habit of buying such symbolic objects, nothing would prevent the purchaser of reproductions of works of art from purchasing the real thing, and eventually acquiring an original from his favourite artist at the same point of sale that provided him with his/her first purchase. An increased volume of new purchasers could contribute to market development through traditional visual arts marketing techniques and progressively generate demand for works at higher prices.

The measures evoked in this section could have an impact on the particular nature of the work of art, as well as modifications to the way the current distribution network operates. Perceptions society has of the artist might also be affected. The researchers, aware of these facts, must however point out that an important potential market exists, that one Canadian out of four reports purchasing lower cost symbolic objects, and that by and large seem to separate from those of individual Canadian artists and visual arts points of sale.

4 FINAL COMMENTS

The Canadian Arts Consumer Profile provides an enormous amount of data concerning current, potential and non-consumers for each zone, each performing arts type of product and each visual arts points of sale. The analysis of the answers to 65,000 completed questionnaires allows the formulation of several marketing suggestions, and others yet to come from the use of the research tools.

Three major themes emerge overall as marketing challenges for both the performing and visual arts and crafts.

First, there is a lot of good will and good intentions on the part of Canadians about the performing and visual arts. Two thirds of Canadians attend the performing arts, one quarter purchase works of visual arts and many are interested in attending or purchasing more frequently : one may assert that there is market potential to be realized. The performing and visual arts producers, presenters and arts marketers must reach out to these consumers to maintain their good will and allow them to indulge their good intentions by persuading them to attend performances and purchase artwork.

Second, while people have access to the excellent performances and artwork produced by Canadian artists and arts organizations, it is certain that the customer service surrounding the delivery of the product can improved and become a major selling point. Arts marketers must expand their repertoire of customer service benefits.

Third, target marketing to specific sociodemographic and psychographic mindsets must become a natural part of the arts marketing repertoire, using tools and techniques unique to specific geographic areas and each arts product, and complementing existing marketing activities with the data available. Custom designed methods can be created that will allow the performing and visual arts to better compete with other at-home and out-of-home leisure activities, and to ensure improved market share and visibility for Canadian artists.

Cultur'inc inc. and Decima Research urge performing and visual arts marketers across the country to exploit and utilize the Canadian Arts Consumer Profile to augment meetings between people and art in Canadian society.

Appendix 1

Methodological Appendix

1 METHODOLOGICAL APPENDIX

This appendix is intended to serve as an aid in interpreting the results of the Canadian Arts Consumer Profile and completes Chapter 1. A detailed and extensive technical appendix, as well as other reports concerning focus groups, pre-tests, and sample frames have been given to the client.

1.1 Methodological Issues

1.1.1 CONSTRAINTS TO ACCESSIBILITY

Factors related to the experience of attending a performance or visiting an art gallery can influence respondents' perceptions and behaviour related to purchase. Such factors, including the general quality of the facility, the level of comfort, automobile and public transportation access, distance, surroundings, etc. had to be evaluated. For example, a person who has a positive attitude toward symphonic music may dislike the mediocre accoustics of the only concert hall in the area, and lovers of visual arts may be intimidated by the treatment that they receive from the sales staff in one of their community's commercial art galleries. Physical access to the product, in these two instances, is counterbalanced by qualitative restrictions and is not sufficient to ensure attendance or purchase. Respondents' perception of performance facilities and sales outlets for works of art was therefore evaluated.

1.1.2 THE HALO EFFECT

An analysis of most polls of cultural behaviour suggests that a gap exists between the actual and stated behaviour of respondents. This approximation of behaviour is often called the *halo effect*, and refers to an "aura," or an softened definition.

After studying several questionnaires and studies, three main factors causing response approximation were identified:

- the tendency of respondents to exaggerate actual product use in attempting to comply with their perception of society's or the interviewer's expectations, or with the questionnaire's obvious intention;
- the imprecise criteria used for differentiating artworks (categories may be considered as too vague, lack of certain categories, possibility of overlapping and redundancy between the categories, overestimation of respondent awareness of such categories);
- questions relating to a time period too far in the past, straining respondents' recall and causing erroneous estimates.

The parameters of the survey and the formulation of the questions took these factors into account. The researchers believed the halo effect could be minimized by specifically shortening and specifying the period to which the question related and clarifying the presentation of product categories. The tendency to exaggerate was also counterbalanced through the use of open questions, by asking the respondent to provide a specific example of his or her behaviour (name the performer or title of the performance attended).

The use of a combination of a telephone/mail general public survey and on-site arts surveys is still the best protection against the halo effect. The main components of the research (among others, sociodemographic profiles, leisure behaviour, motivations and constraints) were therefore simultaneously drawn from actual attenders and purchasers, as well as from individuals declaring they were attenders and purchasers.

1.1.3 Current Product Typologies

The matter of varying levels of consumer awareness and confusion in product classification and knowledge raised a substantial problem for the researchers.

It is generally accepted that the majority of typical artistic work has a clientele that represents a relatively small proportion of the Canadian population; therefore, it can be assumed that the level of knowledge of the distinctions between types of artistic work varies greatly from person to person. This supposition was confirmed in focus groups held with the general public to help develop the questionnaires for this research. Several respondents did not know the meaning of certain categories (chamber music, contemporary dance) while other respondents found the same terms too simplistic to describe their preferences. In the same way, most focus group participants did not know if a performance or work familiar to them was Canadian or if it had been produced by professional or non-professional artists.

This issue was complicated by the many types of classification for artistic products that are currently used by the cultural sector, both in the performing and visual arts. These types of categories are often approximate, and rarely cover all artistic disciplines. Currently, accepted labelling of each of these products does not create a true classification system and often the classifications used overlap. Thus, the labelling of an artistic product:

- often refers to media (painting, sculpture), to form (poems, short stories) or to an artistic discipline (drawing, pop/rock);
- sometimes is commercial and based on distinctions reflecting organizational classification (institutional theatre, independent choreographer, professional artist or performer) or based on the type of audience (ethnic theatre festival, children's theatre); and
- sometimes refers to the aesthetics or the origin of the work (Inuit art, romantic music, Group of Seven, avant-garde theatre, figurative art).

The proliferation of the levels of conventional labelling, their different forms of logical nomenclature and the varying degree of awareness and understanding by the public posed a methodological puzzle to researchers who were seeking statistical rigour and generally speaking, clarity.

After studying several existing product classifications, it was decided that none were suitable either for the purposes of gathering data or the requirements of analysis. Some are too technical to be understood by the general public, others are not sufficiently specific for the needs of experienced consumers, and still others contain too many categories and would therefore result in high research costs.

It was decided, therefore, to prepare one set of product classifications for the performing arts and another set for visual arts. A systematic classification model was tested on

focus groups with arts organizations and has been subsequently established in this inquiry in order to allow for the orderly analysis of collected data. The survey also took the previously mentioned conceptual restriction into account by creating a relatively short list of easily recognizable product categories (disciplines), in order to ensure coherence and comparability between the responses obtained from all the questionnaires.

1.1.4 PERFORMING ARTS PRODUCT TYPOLOGY

The performing arts product classification, to be adaptable to the degree of knowledge of the respondents and the needs of the researchers, was made in two versions used according to the context of the survey. Both versions are mutually compatible and allow for overlapping information between the more general categories and their subdivisions in the other version.

Preliminary focus group tests of the questionnaires demonstrated that respondents from the general public could easily identify the difference between the four traditional performing arts (dance, theatre, opera and music) and most of the popular sub-categories (pop and rock, comedy, folk, musicals, jazz and blues, country and western, heritage performances)[1]. The focus group participants could also identify the performances produced for children and family audiences.

However, to a large extent, participants had difficulty distinguishing between the less commonly known types of performing arts (chamber music, contemporary dance, etc.). Particularly in the context of a telephone interview, it did not appear to be useful to question respondents among general public regarding all performing arts categories. The set of categories used in the general public telephone interview is shown in Table A.1.

For comparative purposes, four other categories of outings were added: sports events, movies, art galleries and museums.

Further discussions with representatives from the artistic community and comments from representatives of the Department of Communications and its partners (in particular the Canada Council) oriented the researchers to focus on the importance of covering the specifics of each type of artistic product. Thus, the performing and visual arts surveys must identify consumer attitudes, preferences and behaviours regarding numerous types of specialized products.

The Canadian Arts Consumer Profile tender recognized this fact; accordingly, the researchers' original research design proposed various options classifying performing arts products into five disciplines (dance, theatre, opera, music, other), 21 categories and 36 sub-categories. Survey costs, however, would increase proportionate to the number of categories, particularly (as is the case here) when a high degree of statistical signifigance is sought regarding each category. Nevertheless, most arts discussion group participants expressed certain reservations about the minimalistic five

1 This category includes performances inspired by the heritage of all the members of Canadian society (first and founding nations, immigrants and ethnic communities).

disciplines typology; they felt that the productions of artistic companies could not be covered under such general categories.

Table A.1

Performing Arts Typology

General public, telephone interview

Ballet
Modern dance performance
Classical music concert
Opera
Play in a theatre
Musical
Pop, rock, or folk music concert or show
Jazz or blues concert or show
Country and western concert or show
Ethnic music or dance performance
Children's play
Sports event
Movie in a movie theatre
Art gallery
Museum

The research team then chose to move from an artistic discipline classification, derived mainly from the organizational categories of funding agencies, and adopted market inspired *types of performing arts product* classification (presented in Table A.2). This decision allowed coverage of a larger spectrum of performances and improved the quality of the analysis of the markets for more specialized types of performing arts products.

Table A.2

Performing Arts Typology

Performing arts survey, short and long questionnaires

General public survey, mail questionnaire

Ballet
Contemporary dance

Theatre: drama
Theatre: comedy
Theatre: avant-garde

Symphonic music
Symphonic "Pops" concert[1]
Contemporary classical music[2]
Chamber music and classical soloists
Opera
Choral music

Pop/rock music
Comedy
Jazz/blues
Musicals
Folk music
Country and western

Ethnic and heritage dance/music
Children's music, theatre, and dance

Open ended questions were included in the performing arts long questionnaire[3] to increase the level of precision in respondent's product identification, and also to identify the type of performances previously attended by the respondents. In future research, this will allow for an even more precise classification of the type of attendance to be identified.

1 Not included in performing arts short mail questionnaire

2 Not included in general public mail questionnaire

3 Place and date of the performance seen, name of artist or company, title of the performance and type of product.

1.1.5 VISUAL ARTS PRODUCT TYPOLOGY

Fewer practitioners in the field of visual arts appear to be familiar with marketing studies and practices, and the world of visual arts has been studied significantly less than the performing arts. Canadian research in the visual arts sector is sparse and incomplete, and quantifiable statistical information about production and distribution is practically non-existent. The same situation exists for a product typology.

To ensure that respondents understood the classifications, whether or not they are purchasers of, or have an interest in, the visual arts, the researchers removed any term which might suggest aesthetic distinctions. Only techniques (painting, sculpture) or media (wood, paper, textile) are referred to in the retained classification.

Adapting the survey tools to the degree of knowledge of the respondents, as with the performing arts, was a major issue of the visual arts questions; accordingly, two versions of the visual arts types of products classification were developed: the general public telephone survey uses five media-related categories as shown in table A.3.

Table A.3

Visual Arts Typology

General public survey, telephone interview
Performing arts survey, short questionnaire

Original painting
Original drawing
Original print[1]
Sculpture
One of a kind craft

As for the performing arts, a more detailed product typology was prepared for the long visual arts, performing arts and general public questionnaires. As shown in Table A.4, additions to the visual arts long questionnaire included a fine crafts typology and a battery of questions allowing respondents to indicate their behaviour or attitude toward geographically qualified types of work.

This classification, particularly in the visual arts long questionnaire, allowed for expressions of degree of appreciation and behaviour with respect to each type of work of art or fine craft, as well as a reference by which respondents were asked to describe their last three artwork purchases. The responses to the open questions related to such categories (information regarding purchased work: price, artist's name, type of purchase place, exact name of the purchase place) or the lack of responses, will permit further research concerning what constitutes the purchase of a work of art for the respondents. The types and names of sale outlets, together with the artist's names, will also allow the establishment of certain classifications according to the aesthetic nature of the works.

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1 In the general public survey telephone interview, print was presented in a single category with original drawing.

Table A.4
Visual Arts and Crafts Typology

	General public and visual arts surveys, long questionnaires
Works of art	Original paintings
	Original drawings
	Original prints (etching, silkscreen, litho, etc.)
	Fine art photography
	Sculptures
	Original textile artwork (tapestry, weaving, printing)
	Video art and other media art
	Installations[1]
	One-of a-kind craft[2]
	Ethnic arts and crafts[3]
	Visual arts survey, long questionnaires
Fine crafts	Jewellery
	Woodwork
	Glasswork
	Ceramics
	Metalwork
	Textile (construction, printing)
	Leather (including binding)
Type of works qualified (theme, style, origin) by geography	
	North American Indian
	Japanese
	Chinese
	Other Asian cultures
	Inuit
	Black African
	Arabian
	Classical North American or European
	Contemporary North American or European
	South American

1.1.6 VISUAL ARTS PARTICULARITIES

Unlike the performing arts, the visual arts product typology could not be used to establish the survey's sample frame.

For the performing arts, the researchers could choose the type of product to be surveyed and arrange for the distribution of questionnaires at a specific performance where a

1 Not included in general public survey.

2 In general public long questionnaire only.

3 In general public long questionnaire only.

predictable number of consumers for type of product would be present. In the world of visual arts, purchasers do not arrive in groups of several hundred at the same time and at a given point of sale to buy the same type of product. A purchaser usually arrives alone at the sales outlet of his/her choice, and the transaction is a private matter. Moreover, many galleries, artist-run centres or artists sell various types of work (sculptures, paintings, drawings, etc.).

Consultations with experts, gallery directors and representatives of visual arts and crafts associations convinced the researchers that an approach through intermediaries was necessary for many reasons; among them, the structure of the visual arts market and the very private and confidential nature of commercial transactions between vendors and purchasers.

1.1.7 VISUAL ARTS POINTS OF SALE CATEGORIES

Exploratory work by the researchers and the Department of Communications suggests that a useful parameter of differentiation affecting purchase in the visual art market is not so much the type of product as the type of sales outlet. According to this perception:

- a gallery sells works of various types (sculpture, painting, drawing) of consistent style, period or other aesthetic parameters to one constant clientele and at appropriately consistent price levels; and
- another gallery or point of sale sells products of the same type (painting, drawing, sculpture) but aesthetically different from the first, the sales being made to a different type of clientele and often at different prices.

In other words, the arts market seems to be divided into a strata system based on socio-economic parameters and subjective criteria rather than on the basis of easily standardizable types of works. In order to complete the mandate with respect to visual arts, product differentiation by purchasers was made in two stages in the survey:

- the sampling frame in was established according to types of sales outlet, and
- the category of work purchased was then analysed.

Table A.5 identifies the types of sales outlets that constitute the visual arts sample frame.

Table A.5 Visual Arts Points of Sale Typology
Private professional galleries
Artist-run centres
Professional artists
Friends of museums
Fairs
Auctions
Craft galleries
Shopping centre galleries

The points of sale typology was established by following, as much as possible, extant structures and associations.

1.2 Gathering the Data

1.2.1 THE RESEARCH TOOLS

In solving the Canadian Arts Consumer Profile conceptual and methodological issues, the research script was conceived and written in a way that would enable the analysis of the three consumer types. As Table A.6 shows, the three surveys required six different questionnaires, along with other research tools.[1]

The Canadian Arts Consumer Profile originally was comprised of five questionnaires. However, the response rate to the performing arts short questionnaire vastly exceeded expectations, allowing development and implementation of a sixth questionnaire relating to festivals.

The short questionnaires in both the general public and performing arts surveys (regular performances, festivals) allowed for a broad representation and also provided identification of the people who would agree to being mailed a longer, more complete questionnaire. The mailed questionnaires in turn allowed for a more detailed and elaborate probing of the buying behaviour, motivations and constraints of the three consumer types.

The visual arts survey was accomplished with a single long, mailed questionnaire.

The survey methodology was established, as seen earlier, through experience and analysis of existing material. Also, Cultur'inc inc. and Decima Research tested and

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1 Canadian Arts Consumer Profile – 1990-1991 – Questionnaires, DOC, January 1992. The questionnaires have been published in order to facilitate understanding of the Canadian Arts Consumer Profile, to provide for use of the questions and questionnaires by Canada's not-for-profit performing arts, visual arts, and other cultural organizations, and to assist development of audience research projects. For-profit and other interested organizations should contact a member of the Management Committee for permission to replicate or use the questionnaires.

refined it at meetings with the arts community and through focus groups composed of marketing experts for the performing and visual arts.

Consultation throughout the development of the questionnaires helped determine and properly reflect the issues of most concern to the arts community, and specify concerns by the appropriate questionnaires. Focus groups with respondents from Canada's two official language groups were also held to determine, among other topics, awareness of product differentiation.

The differences between the target groups to be surveyed also had to be respected, yet the questionnaires also had to form a bridge so data sets could be compatible and allow cross analysis. Once the actual content was defined, the design of each questionnaire came into play: were the questions properly formulated, what response does a particular combination or sequence of questions elicit (timing is everything), was it clear and relatively easy to complete?

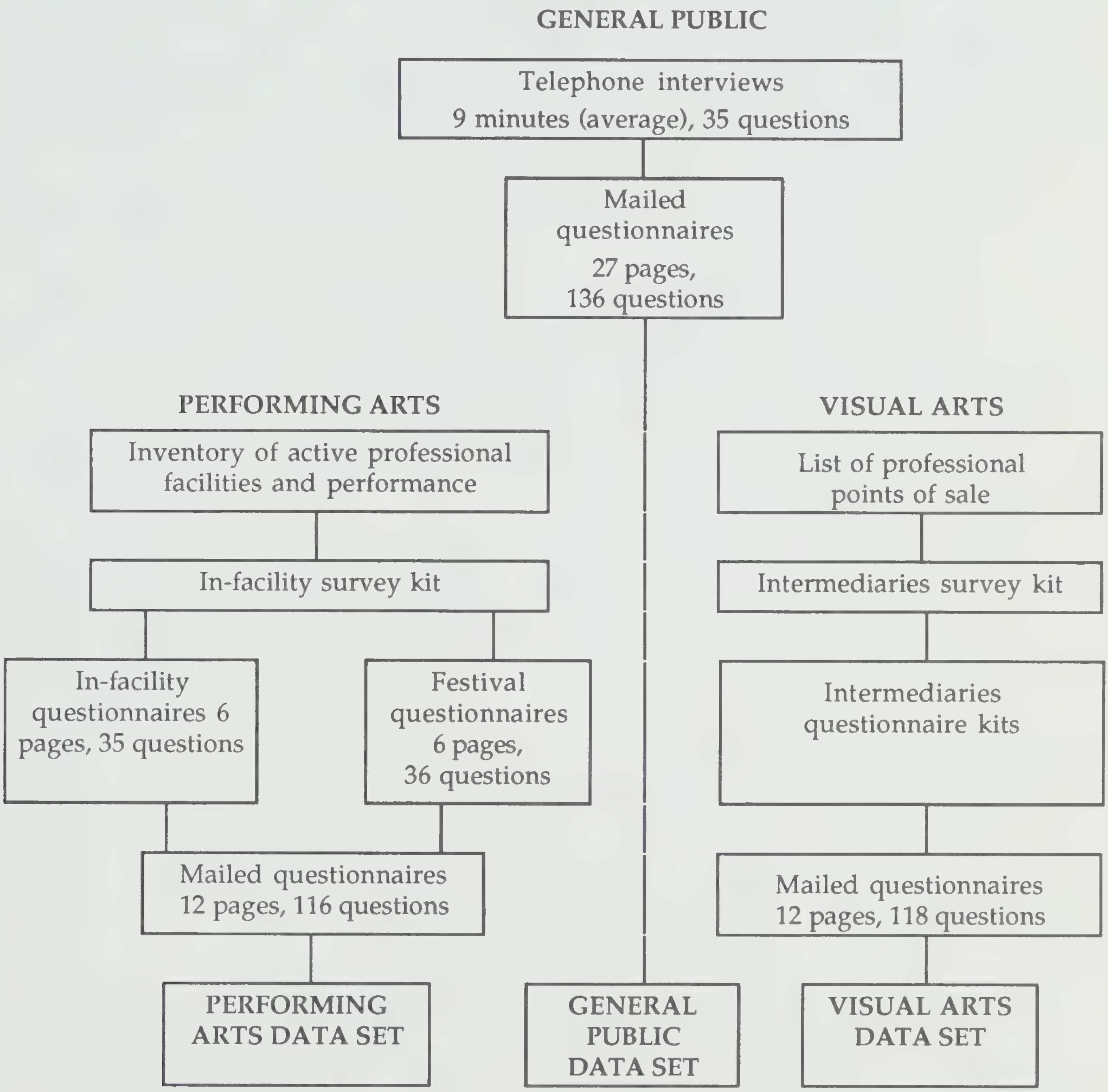
The short general public telephone survey was repeatedly tested and rehearsed until the time duration and maximum response rate were achieved. The general public mail questionnaire was tested with both current and non-consumers purchasing. Testing was conducted in French and English.

The short, in-facility performing arts questionnaire was examined for clarity and content with consumer focus groups and then tested at five facilities across Canada, at both French and English performances. This also permitted the testing of delivery services, the comprehension of the survey process by facility personnel, as well as the questionnaire response. Similarly, the long mail performing arts questionnaire and the visual arts long mail questionnaire were tested in focus groups for content and clarity, and through a mail response test.

The performing arts survey required an extensive inventory of performance facilities and their available programming; while the visual arts survey required a listing of various types of points of sale. The inventory was developed with presenters, exhibitors, dealers and artists involved. Lists of producers, presenters, programming, galleries, and artist-run centres were drawn up and reviewed by the National Coordinator and the Management Committee for content and accuracy.

Table A.6

CANADIAN ARTS CONSUMER PROFILE RESEARCH TOOLS



1.3 Performing Arts Survey

1.3.1 Inventory Parameters and Perspective

It should be pointed out that the recently published Statistics Canada Performing Arts Survey 1990-1991 reported a programming inventory of 40,555 performances, whereas the Canadian Arts Consumer Profile reported a programming inventory of 18,955 performances. The Statistics Canada survey, however, is very different in form and intent from the Profile; but, because it also deals with inventory, these differences are noted below in order to avoid confusion when interpreting the results:

- the Statistics Canada survey is economically oriented, and more concerned with income, expenses, surplus and deficits than performances, which are specified by five broad categories;
- the Profile inventory is mainly market oriented, being aimed at the theatres and facilities where performances take place, while Statistics Canada's relies mainly on producing organizations;
- the survey covers a different period than the Canadian Arts Consumer Profile – a 12-month period between September 1989 and August 1991, depending on respondents fiscal year, whereas the performing arts inventory for the Profile covers the 9 months between September 1, 1990 and June 1, 1991;
- the Statistics Canada survey includes touring in non-professional facilities, school performances, semi-professional performances and, it would appear, touring dates outside Canada;
- the programming inventory for the Canadian Arts Consumer Profile was conducted in professional facilities, in the main, seeking only professional performances. Some ethnic cultural performances were the exception;
- the verification method applied by the Profile also allowed for cancellations and scheduling changes.

1.3.2 Facilities Inventory

The final total of 348 active professional facilities from across Canada began with a basic list compiled from such sources as the Canada Council Touring Office Directory, the Canadian Arts Presenters Association/l'Association canadienne des organismes artisitques (CAPACOA), le Réseau indépendant des diffuseurs d'événements artistiques unis (RIDEAU), Théâtres associés inc. (TAI) and the Professional Association of Canadian Theatres (PACT). In some zones, such as rural Saskatchewan and New Brunswick, schools and community centres are an important part of the distribution network, and volunteer presenting organizations like the Organization of Saskatchewan Arts Councils were tremendously helpful in augmenting the list of performance venues.

As the network of professional contacts expanded, further venue suggestions were implemented along with information gathered from regional newspapers and periodicals. Facilities that either did not present professional performances or were in hiatus during the research period (the duMaurier Theatre at Harbourfront in Toronto, for example, was undergoing renovations at the time) were not included in the inventoried list of active facilities. Those facilities which the researchers were unable to

contact after repeated attempts and for which no programming was received or collected from any source were also excluded from the final list of active professional facilities.

The National Coordinator of the Canadian Arts Consumer Profile wrote the administrators of all facilities and producing theatres explaining the intent of the survey and soliciting their cooperation. Response from the facilities to the initial request for information was over 80%, and included specifics regarding capacity, average ticket prices per discipline, services in the area (bars, restaurants, etc.), their budget for presenting or producing performances and programming information. Many of the other facilities were ascertained to be inactive or representative of more rural volunteer presenting organizations, which were not part of the survey except when a particular performance discipline was only available through this network.

Table A.7

Geographic Distribution of Inventoried Facilities 90-09-01 to 91-08-31

Zone	Facilities catalogued		Facilities inventoried		Facilities inventoried / Facilities catalogued
	Nbr.	%	Nbr.	%	
British Columbia	17	4%	13	4%	76 %
Alberta	32	8%	25	7%	78 %
Saskatchewan	21	5%	19	5%	90 %
Manitoba	18	4%	16	5%	89 %
Ontario	67	16%	54	16%	81 %
Quebec	68	17%	62	18%	91 %
New Brunswick	20	5%	17	5%	85 %
Atlantic Provinces	23	6%	20	6%	87 %
Vancouver	24	6%	20	6%	83 %
Toronto	53	13%	43	12%	81 %
Montreal	66	16%	59	17%	89 %
Total:	**409**	**100%**	**348**	**100%**	**85 %**

1.3.3 PROGRAMMING INVENTORY

Gathering the inventory from across Canada of over 18,955[1] performances for the fall, winter and spring of 1990-91 season posed some challenges.[2] While some presenting facilities and performance companies and artists are fortunate enough to know what their schedules are a year in advance, a system had to be developed which would not only accommodate those with a less rigorous calendar, but also allow the researchers to keep track of last minute cancellations, additions or changes.

Accordingly, requests for programming information (dates, artists/company, type of performance, whether or not the performance was on subscription) were sent out corresponding to the three survey collection waves: September through January, January through June and June, July and August — with a special request for festival programming in this final wave to augment the list of festivals provided by the Department of Communications and the Management Committee. Individual programming sheets for previous waves were enclosed with the requests for Waves 2 and 3 so facilities had the opportunity to update and correct previously obtained data.

This procedure, while somewhat demanding for the facilities, worked well due to the conscientiousness of the many people involved who, it can be presumed, were simultaneously preoccupied with the day-to-day problems of running their own events and facilties.

It is important to note that the producing theatre or facility was responsible for categorizing the performance according to the performing arts product typology. This categorization was verified by the researchers, the National Coordinator and, occasionally, the Management Committee and negotiated with the producer or presenter when questioned.

There was, not unexpectedly, some diversity of opinion on categorizing certain performances. Kashtin, the Québecois group composed of two young Montagnais, sing in their native language and embody a traditional spiritual heritage while playing to largely pop/rock audiences. To some, The Heidi Chronicles is a comedy, to others a drama; Colin James is acclaimed for both his blues and rock guitar, and two facilities which presented the comedy troupe Three Dead Trolls in a Baggie may have been somewhat surprised to learn they had booked neither a rock group nor a children's show. Sincerely a Friend, the Music of Leonard Cohen, was originally categorized as pop/rock, then later as a musical when it was learned that, rather than a musical tribute, this was a performance piece with a story line.

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1 The total number of regular performances inventoried, including summer, but without festivals, is 22,400.

2 The geographic distribution for these performances is shown in Table 3.7, Chapter 3.

1.3.4 PERFORMING ARTS COLLECTIONS

The performing arts survey occurred in three waves:

- October to December 1990;
- January to June 1991;
- June to August 1991.

A collection, in the Profile's jargon, constitutes a performance chosen as part of the sample frame to represent a type of product in a given zone. A collection also represents a performance where short performing arts questionnaires were distributed to current audiences.

Prior to the selection process, the number of performances to be surveyed in each zone was established based on the zone's percentage of the total number of inventoried performances and the research design. Choosing the actual performances, which ideally would cover each type in every zone, became a matter of product availability.

Priority was given to performers indigenous to the zone and, whenever possible, equal weight was given to typical and atypical presentations of particular disciplines. Priority was given as well to geographic distribution within a zone.

Selections were also made to limit the number of surveys in any given facility in order to counterbalance survey fatigue on the part of facility personnel and to avoid an overly surveyed audience, as might be the case in some communities with only one multidisciplinary presenting facility or major organizations in large urban centres. Every attempt was made to include at least one survey for each type in all zones, however, avant-garde theatre or contemporary classical music performances for example, were rarely found outside major centres.

The goal was 350 collections; in fact, 351 collections from across Canada were completed and verified, and during the 10-month collection period, only five boxes of questionnaires could not be accounted for. An effective, standardized system was used at every stage of the collection operation which was flexible and responsive enough (a variety of delivery options were already in place, for example, prior to the 24 hour notice of a strike which occurred at a major courier service during the summer collections) to minimize the effect of unpredictable events.

The field team, thoroughly briefed with detailed printed instructions and working materials for every stage of the collection operation, were closely supervised by the field coordinator. Their work was verified by another member of the field team, and also regularly checked by the field coordinator and the project manager. The field team also held regular meetings to adjust and refine operational procedures. The following briefly describes the collection activities:

- An initial contact was made with the administrator of each facility for permission to do the survey, to confirm suitable dates, to explain the delivery procedures for the execution and return of the survey questionnaires, to inquire about any foreseeable problems and discuss alternative solutions.
- A survey coordinator was identified, usually the house manager. Each survey coordinator at the facility was given precise instructions, with a minimum of

two telephone sessions to clarify the distribution method and resolve any potential problems prior to the survey.

- The collection box was assembled and the appropriate courier service notified.
- Follow-up consisted of a minimum of one telephone call after the collection to verify its completion and confirm the method of return for survey.
- The field team at Cultur'inc kept a dated, written record of all contacts with the collection facilities and the result, from the initial contact to the return of the collection box.

Also essential were clear and detailed instructions, and good communications with the facility personnel:

- Every box delivered to collection sites contained a personal note from the field team member to the survey coordinator, written instructions and a brief explanation of the survey, pencils, questionnaires (number determined by facility capacity and expected attendance, plus a minimum of 10 questionnaires in the second language), survey posters, collection report (facility capacity, attendance, questionnaires distributed, average ticket price) and a return kit. The survey coordinator was instructed to distribute the questionnaire to the first 250 persons to arrive at the facility.

The questionnaires were printed on recycled paper, and the pencils were returned with the completed questionnaires, when possible, for redistribution.

Table A.8

Distributions of Collections 90-09-01 to 91-08-31

	BC	Alb	Sask	Man	Ont	Qué	NB	Atl	Vanc	Tor	Mtl	Total
Ballet	1	2	1	1	4	1	1		1	4	1	17
Contemporary dance	1	3	1		2	3	2	2	2	2	1	19
Theater: comedy	3	2	1	2	4	3	1	1	3	6	5	31
Theater: drama	2	1	2	3	3	3	2	3	2	5	5	31
Theater: avant garde		2		1	2	1			1	2	7	16
Opera	1	1	1	1	2	1	1		1	2	2	13
Symphonic music	1	1	1	1	2	2	1	3	2	4	2	20
Symphonic Pops concerts	1	1	1	2	2	2		1	1	1	1	13
Chamber music/class. soloists	1	1	1	1	4	4	2	1	5	4	4	28
Contemporary classical music	1				1	1		1	1	1	1	7
Choral music	1	1	1		3	1	1	1	2	2	1	14
Pop/rock music	1	2	1		2	3	1	1	1	1	2	15
Comedy	1	1	1	1	1	2	1	1	2	2	4	17
Folk music	1	1	1	1	3	2		2	2	1	2	16
Musicals	1	2	1	3	3	1		3	2	5	2	23
Jazz/blues	1	6	1	1	3	1	2	1	2	2	4	24
Country & western	1	2		1	1	1						6
Children's music, theatre, and dance	2	3	3	2	4	3	1	2	3	3	1	27
Ethnic and heritage dance/music	1	1		1	1	1	1	1	2	4	1	14
Total	22	33	18	22	47	36	17	24	35	51	46	351

The quality of cooperation from the producers and facility personnel was excellent, and crossed all boundaries of size of hall, staff, and budget; although, even with the best intentions, the unpredictable happened. One house manager, concientiously adhering to the request that questionnaires be securely stored prior to their use, placed them in a safe and unfortunately the key could not be located in time for the performance. At Place des Arts in Montréal, a seemingly unsolvable problem occurred when staff and management were unable to find a way to insert the 250 short questionnaires in the house program, resulting in very low return rates for every collection distributed in this multi-hall complex. It must be emphasized that these events were extraordinary and not the rule; particularly in light of the necessary scope and multiple stages involved in the collection operation, there were a only a few problematic incidents.

A specific short, on-site questionnaire was designed for use at 58 estival performances during the summer wave of the performing arts survey because the number of short performing arts questionnaires received exceeded the target response early in the survey, and because of interest in surveying festivals with a questionnaire specific to them.

Surveying festivals was particularly challenging. With a limited time period for events in venues that are not as controlled as facilities, staff are usually under enormous pressure and many accomplished the task of blending the survey into their program of events on sometimes limited notice.

Children's festivals provided an opportunity to improve the response rates for that category. Parents appeared more likely to accompany their children to a festival than they would to a more controlled and structured performance environment such as a school presentation (not surveyed) or a community theatre matinee.

The good humour with which most organizations greeted the survey was exemplified by the photos received from the Vancouver Folk Festival, one showing their ushers handing out questionnaires wearing T-Shirts with a check mark on the back, and another which gave a strong visual explanation as to why the return might not be high – a blur of people charging for their seats after going through the entrance. (In fact, the response rate for this particular collection was above average for festivals.)

Because of the special circumstances surrounding festivals, it was presumed that there would be a greater number of cancellations (ordinarily, during the regular season there would be the opportunity of a later retrieval date at the facility) and the expectation of a lower questionnaire return (filling out questionnaires could not realistically compete with the delicious freedom of absorbing both the sun and Mozart on a lazy afternoon). Some summer theatres, as well as some regular performances, were also included in the summer collection wave.

1.3.5 Gathering Long Questionnaires

Short questionnaire respondents were asked to provide their names and addresses if they were willing to complete a long questionnaire, administered by mail. The respondents addresses were entered in a specially designed data set and a long questionnaire was then mailed.

Reminder postcards were sent to respondents shortly after the long questionnaires were mailed and if there was no response, two months after the surveyed performance personalized letters were sent with another questionnaire enclosed.

While this persistence was annoying to some people, it was nonetheless effective in increasing the return. As well, many people took the opportunity to write thoughtful, witty and sometimes moving comments covering a variety of subjects: how art and artists personally affect them, political messages, and expressions of concern over the lack of consideration, for example, given those audience members, and potential audience members, with hearing and sight problems.

1.3.6 Performing Arts Response Rates

The objectives for the performing arts surveys, as per the orginal research design, were as follows:

- Short questionnaires 26,600
- Long questionnaires 8,867

The long questionnaire objective was later adjusted, as shown by Tables A.9 and A.10, to tie into a percentage of the *maximum number of possible short questionnaires,* rather than a percentage of the original number of 250. The reason for this adjustment was to account for not only the capacity of some collection facilities (many were between 100-200 seats) but also for varied attendance levels. As shown in Table A.9, the short questionnaire objective was 26,676. The 76 short questionnaire objective over and above the research design reflects the extra collection accomplished beyond the goal of 350.

Over 300,000 audience members were reported as attending the 351 performances and festivals surveyed; 69,953 short questionnaires were distributed, 43,292 were completed and 39,628 were validated. Of these, 11,602 respondents requested long questionnaires, with 7,358 long questionnaires completed and validated.

The following tables illustrate, by type and by zone:

- the number of valid short questionnaires;
- the number of valid long questionnaires;
- the response rates for short questionnaires (%);
- the response rates for long questionnaires (%).

Table A.9

Number of Performing Arts Valid Short Questionnaires 90-09-01 to 91-08-31

Type	BC	Alb	Sask	Man	Ont	Qué	NB	Atl	Vanc	Tor	Mtl	Actual total	Ob-jective
Ballet	150	358	200	134	539	196	164		131	384	179	**2435**	**1292**
Contemporary dance	76	309	128		193	325	178	159	137	289	171	**1965**	**1444**
Theater: comedy	523	227	192	323	469	381	143	103	183	418	574	**3536**	**2356**
Theater: drama	367	160	277	499	404	320	277	288	215	484	488	**3779**	**2356**
Theater: avant garde		121		22	82	240			60	249	572	**1346**	**1216**
Opera	31	181	40	117	234	112	94		107	226	208	**1350**	**988**
Symphonic music	192	200	180	182	353	309	139	462	326	532	172	**3047**	**1520**
Symphonic Pops concerts	84	158	118	315	301	346		154	170	159	94	**1899**	**988**
Chamber music/class. soloists	127	60	149	82	660	435	360	41	707	289	198	**3108**	**2128**
Contemporary classical music	180				96	39		76	98	25	126	**640**	**532**
Choral music	136	155	175		385	58	63	89	164	391	140	**1756**	**1064**
Pop/rock music	176	154	186		215	401	118	138	92	166	200	**1846**	**1140**
Comedy	177	112	23	137	200	219	119	140	235	166	391	**1919**	**1292**
Folk music	190	69	116	98	377	279		275	212	58	129	**1803**	**1216**
Musicals	202	82	135	386	404	59		353	144	565	335	**2665**	**1748**
Jazz/blues	152	817	197	55	325	35	244	77	218	114	197	**2431**	**1824**
Country & western	95	367		72	155	132						**821**	**456**
Children's music, theatre, and dance	250	353	302	73	409	165	188	92	113	270	18	**2233**	**2052**
Ethnic and heritage dance/music	25	125		69	67	182	98	72	180	212	19	**1049**	**1064**
Actual total	**3133**	**4008**	**2418**	**2564**	**5868**	**4233**	**2185**	**2519**	**3492**	**4997**	**4211**	**39628**	
Objective	**1672**	**2508**	**1368**	**1672**	**3572**	**2736**	**1292**	**1824**	**2660**	**3876**	**3496**		**26676**

Table A.10

Number of Performing Arts Valid Long Questionnaires 90-09-01 to 91-08-31

Type	BC	Alb	Sask	Man	Ont	Qué	NB	Atl	Vanc	Tor	Mtl	Actual Total	Objective
Ballet	43	57	38	33	106	35	27		24	91	41	495	421
Contemporary dance	9	64	32		35	49	37	37	17	67	55	402	348
Theater: comedy	71	42	14	51	74	42	25	13	21	87	57	497	598
Theater: drama	67	23	58	87	80	54	61	53	46	89	85	703	622
Theater: avant garde		16		4	20	43			17	53	91	244	217
Opera	10	44	8	18	52	22	12		30	34	55	285	295
Symphonic music	66	58	44	48	109	51	33	108	78	148	53	796	468
Symphonic Pops concerts	23	30	40	81	80	68		34	27	40	24	447	320
Chamber music/class. soloists	30	19	23	19	149	83	102	8	129	46	30	638	573
Contemporary classical music	43				34	10		20	22	9	31	169	96
Choral music	15	37	36		91	10	8	18	18	100	39	372	325
Pop/rock music	26	22	27		38	55	13	36	14	18	35	284	359
Comedy	18	18	4	27	32	32	29	33	27	18	73	311	362
Folk music	23	12	22	22	42	28		54	36	10	19	268	367
Musicals	49	17	28	45	77	8		55	13	93	45	430	474
Jazz/blues	27	126	49	8	67		50	16	40	22	44	449	500
Country & western	12	42		14	15	18						101	150
Children's music, theatre, and dance	24	50	32	8	40	20	31	11	18	41	12	287	568
Ethnic and heritage dance/music	4	26		13	21	18	12	8	32	46		180	306
Actual total	560	703	455	478	1162	646	440	504	609	1012	789	7358	
Objective	522	724	386	463	1040	740	395	459	715	993	931		7367

Table A.11

Performing Arts Response Rate Short Questionnaire 90-09-01 to 91-08-31

Type	BC	Alb	Sask	Man	Ont	Que	NB	Atl	Vanc	Tor	Mtl	Avg. / collect.
Ballet	60%	72%	80%	54%	54%	95%	66%		52%	38%	72%	**58 %**
Contemporary dance	76%	54%	51%		65%	69%	47%	35%	46%	69%	68%	**56 %**
Theater: comedy	81%	45%	83%	65%	63%	66%	57%	41%	50%	51%	52%	**59 %**
Theater: drama	73%	64%	91%	73%	54%	43%	55%	73%	76%	55%	53%	**61 %**
Theater: avant garde		51%		63%	50%	96%			53%	86%	53%	**62 %**
Opera	12%	72%	77%	47%	47%	45%	55%		43%	47%	42%	**46 %**
Symphonic music	77%	80%	72%	73%	71%	62%	56%	76%	65%	65%	34%	**65 %**
Symphonic Pops concerts	34%	63%	47%	63%	60%	69%		62%	68%	64%	47%	**59 %**
Chamber music/class. soloists	51%	24%	60%	64%	66%	57%	72%	51%	57%	43%	34%	**54 %**
Contemporary classical music	72%				72%	83%		70%	89%	38%	50%	**66 %**
Choral music	54%	62%	70%		51%	53%	25%	64%	33%	78%	56%	**54 %**
Pop/rock music	70%	34%	74%		50%	53%	47%	55%	46%	66%	40%	**51 %**
Comedy	71%	45%	68%	79%	80%	44%	48%	56%	67%	53%	39%	**53 %**
Folk music	76%	28%	46%	65%	53%	56%		55%	42%	23%	43%	**49 %**
Musicals	81%	76%	54%	51%	58%	59%		61%	39%	50%	67%	**56 %**
Jazz/blues	61%	59%	79%	50%	55%	30%	61%	31%	50%	30%	24%	**49 %**
Country & western	38%	73%		29%	62%	53%						**55 %**
Children's music, theatre, and dance	50%	47%	41%	18%	47%	33%	75%	24%	17%	45%	36%	**39 %**
Ethnic and heritage dance/music	11%	50%		36%	27%	73%	39%	71%	38%	26%	8%	**34 %**
Avg. / coll.	**60%**	**55%**	**63%**	**55%**	**56%**	**57%**	**55%**	**55%**	**49%**	**50%**	**45%**	**54 %**

Table A.12

Performing Arts Response Rate Long Questionnaire 90-09-01 to 91-08-31

Type	BC	Alb	Sask	Man	Ont	Que	NB	Atl	Vanc	Tor	Mtl	Avg. / collect.
Ballet	17%	11%	15%	13%	11%	17%	11%		10%	9%	16%	12 %
Contemporary dance	9%	11%	13%		12%	10%	10%	8%	6%	16%	22%	12 %
Theater: comedy	11%	8%	6%	10%	10%	7%	10%	5%	6%	11%	5%	8 %
Theater: drama	13%	9%	19%	13%	11%	7%	12%	13%	16%	10%	9%	11 %
Theater: avant garde		7%		11%	12%	17%			15%	18%	8%	11 %
Opera	4%	18%	15%	7%	10%	9%	7%		12%	7%	11%	10 %
Symphonic music	26%	23%	18%	19%	22%	10%	13%	18%	16%	18%	11%	17 %
Symphonic Pops concerts	9%	12%	16%	16%	16%	14%		14%	11%	16%	12%	14 %
Chamber music/class. soloists	12%	8%	9%	15%	15%	11%	20%	10%	10%	7%	5%	11 %
Contemporary classical music	17%				25%	21%		19%	20%	14%	12%	18 %
Choral music	6%	15%	14%		12%	9%	3%	13%	4%	20%	16%	11 %
Pop/rock music	10%	5%	11%		9%	7%	5%	14%	7%	7%	7%	8 %
Comedy	7%	7%	12%	16%	13%	6%	12%	13%	8%	6%	7%	9 %
Folk music	9%	5%	9%	15%	6%	6%		11%	7%	4%	6%	7 %
Musicals	20%	16%	11%	6%	11%	8%		9%	4%	8%	9%	9 %
Jazz/blues	11%	9%	20%	7%	11%	0%	13%	6%	9%	6%	5%	9 %
Country & western	5%	8%		6%	6%	7%						7 %
Children's music, theatre, and dance	5%	7%	4%	2%	5%	4%	12%	3%	3%	7%	24%	5 %
Ethnic and heritage dance/music	2%	10%		7%	8%	7%	5%	8%	7%	6%	0%	6 %
Avg. / coll.	11%	10%	12%	10%	11%	9%	11%	11%	9%	10%	8%	10%

1.4 Visual Arts Survey

1.4.1 INTERMEDIARIES

As seen earlier, the purchasing of a piece of artwork is more of a private communion than something to be experienced frequently and in large groups, and there is no set price for singular pieces of art, and visual arts purchasers are apt to desire discretion about what are personal purchases.

Galleries, auctioneers and other private entrepreneurs quite naturally wished to protect the confidentiality of their client mailing lists and were keen to protect the privacy of their business practices. It was not possible for the researchers to have access, even indirectly, to point of sale lists of purchasers

The problem then was, how to survey visual arts purchasers if they did not wish to be connected directly with their purchases through a survey? The solution proposed to gallery and artists-run centres associations at an early stage of the research was to use the points of sale as intermediaries.

A sample frame of visual art and craft points of sale was designed by following as much as possible existent structures. Entry criterias were established for each type of point of sale:

- private professional galleries had to be members of their national associations (Professional Art Dealers Association of Canada, Association des galleries d'art de Montréal), as well as artist-run centres (Association of Nonprofit Artist Centres) and the Association of Friends of Museums;
- professional artists were identified through the Canada Council;
- the lists for other categories (auction, fairs, craft galleries and shopping centre galleries) were sampled from phone directories or recommended by practitioners.

The Management Committee again was a great help and their suggestions were integrated into the final list, which they vetted and approved prior to the mailing operation.

Table A.13

Visual Arts Survey - Sample frame

Type of points of sale	Nbr of points of sale	Nbr of questionnaires per point of sale	Total Nbr of questionnaires distributed
Commercial galleries	101	44	4,444
Artist-run centres	50	30	1,500
Craft galleries	16	38	608
Friends of museums associations	34	27	918
Shopping centre galleries	26	23	598
Fairs	15	40	600
Auctions	13	30	390
Artists	589	5	2,945
Total	844		12,003

1.4.2 Long Questionnaire Gathering

All private professional galleries, artist-run centres, elegible professional artists[1] and friends of museum associations were surveyed. All identified fairs, auction and craft galleries were also surveyed. Shopping centre galleries found in telephone directories were also subject to sampling.

The National Coordinator wrote all intermediaries to request their cooperation in forwarding the questionnaires to their clients. A kit containing prestamped, prepackaged envelopes containing questionnaires, business reply envelopes and precise distribution instructions was sent to various types of intermediaries (professional artists, museums, commercial galleries, shopping centre galleries, artist-run centres, craft galleries, fairs and auctions) who would then forward them to their clients.

This would protect both the confidentiality of the clients and also the intermediaries' rapport with their clients. In fact, for professional artists and museums, an additional go-between was used; the Association of Friends of Museums distributed the kits to their members, and the Canada Council distributed the kits to professional artists.

Each type of intermediary received a certain number of prepackaged envelopes, as indicated in Table A.13, corresponding to their capacity to distribute them. Their task was to randomly select purchasers, address the envelope and to put the prestamped envelope in a mailbox.

1 Artists on the Canada Council lists.

Surveying visual arts consumers was done in one wave during May and June of 1991, with 12,003 questionnaires sent to 844 intermediaries. To a great extent, the success of this operation relied first on intermediary cooperation and then on the accuracy of their client mailing list. The researchers had no control over the operation, and only the verification of intermediary addresses was possible. No verification was possible for friends of museums and professional artists.

There is no way to confirm the actual number of questionnaires distributed by the intermediaries to their clients, however the return rate because of wrongly addressed (moved, etc.) client/respondent envelopes was surprisingly low – 75 from 12,003 – which suggests that possibly intermediary cooperation was variable.

Furthermore, professional artists tend to be mobile, and there was a 7% return rate for intermediary kits with outdated addresses. It can be assumed that this percentage is only a proportion of those kits which did not reach their destination. Within this group, clients are often other artists, and "purchases" may take the form of "trading" and as such, many felt the questionnaire, or a large portion of the questionnaire, did not apply to them.

1.4.3 Visual Arts Response Rates

Eighty-four percent (84%) of the design objective was attained in the visual arts survey; 1,672 questionnaires were returned and verified. Informal verifications done by association's representatives with their members suggested that the questionnaires not actually reaching the respondents were most probably responsible for the lower return. Also of concern is that the visual arts questionnaire was of necessity somewhat more intricate and demanding than the performing arts questionnaire, particularly for the inventory questions. It is a little more difficult to recall the price one paid for a silkscreen purchased five years ago, than it is to recall the price one paid for the last performance attended. Nonetheless, the quality of the response and commentary was very high; clearly, most respondents who took part did not take the task lightly.

1.5 General Public Survey

1.5.1 TELEPHONE SURVEY

1.5.1.1 Sample Selection

The population surveyed by the Canadian Arts Consumer Profile consists of all Canadians, 16 years of age and over. Male and female respondents were selected in the same proportion as the general population, on a 50/50 sex quota. A total of 11,106 telephone interviews were completed, with 5,475 completed in Wave 1, and 5,631 completed in Wave 2. Due to an unexpected low return rate of the mail questionnaires from New Brunswick Francophones, it was necessary to conduct an oversample of telephone surveys among this specific population to ensure enough completed mail surveys were returned to meet the target number as specified in the research design.

Effective survey research must be based on a sample truly representative of the universe of interest. A multi-stage sampling technique was employed to gather the data for this study. The essential feature of this procedure is that individual respondents are predetermined by the selection procedure itself. That predetermination is made by careful speculation of a series of controlled choices.

The sampling technique produced a systematic random sample with probability of selection disproportionate to the size at the national level.

The first step in the sampling procedure was the division of the provinces into zones, based on community size. Samples from the three major centres of Vancouver, Toronto, and Montréal were drawn independently of the provincial zones.

Within each of these regions, a sampling procedure was employed which is based on mapping the linkage between the geographic location of individual telephone exchanges and Statistics Canada's fundamental building block for the census – the enumeration area (EA)

Telephone companies divide their service regions into smaller areas served by a single switching centre. Within each switching centre area, all telephone numbers begin with the same two digits. We refer to these mutually exclusive exchange areas as NNXs (NNXs representing the first three digits of a telephone number). Using census data together with maps showing the geographic boundaries of NNXs, it is possible to determine exact population figures for each NNX and determine the appropriate number of respondents to be surveyed in each NNX.

Primary sampling units (groups of NNXs) and secondary sampling units (individual NNXs) were selected on the basis of probability proportionate to population size. Telephone numbers were then generated using a computerized random number generation program employing random start and fixed interval methods.

It should be noted that the sample is only representative of residents in the provinces who have direct dialling telephone services. Therefore, Canadians who are accessible by a telephone servicing a large number of people, such as senior citizen homes, hospitals and Indian Reserves, and those who have on only radio-telephone service or no telephone service at all are automatically excluded from the sample. Any further

questions the reader has about sampling should be referred to the Project Director at Decima.

1.5.1.2 Pretest

In order to refine the questionnaire, a pretest was conducted. Interviews were conducted by experienced interviewers and the research analyst monitored these interviews while they were in progress. The field supervisor and research analyst held a debriefing session to discuss the questionnaire with the interviewers. Based on the pretest results, a few minor changes were made to the questionnaire which facilitated the field portion of the study.

1.5.1.3 Field Procedures

The questionnaires were printed, consecutively numbered and assembled into field packs of five interviews – three males and two females or three females and two males. This procedure ensured that the 50/50 sex quota would be met by preselecting males and females before the interviewing began.

The interviews for Wave 1 were conducted between March 5 and April 28. Interviews for Wave 2 were conducted between October 4 and October 17. Weekday interviewing was conducted between the hours of 5:30 and 10:00 p.m. Weekend interviewing was conducted between the hours of 10:00 a.m. and 5:00 p.m. The telephone questionnaire contained 35 items and took, on average, nine minutes to complete. Fifteen percent (15%) of all interviews were monitored while in progress for procedure and content from an extension monitor. All interviews were carefully edited as soon as they were completed to ensure that no questions were omitted and that skip-patterns were followed correctly.

Experienced telephone interviewers were used to collect the data. A briefing was held by the field supervisor. The field supervisor first read the questionnaire to the interviewers, thereby ensuring that pronunciation would be correct and uniform, and second, interviewer-respondent role – playing was used to illustrate skip and rotation patterns. The interviewers then had an opportunity to ask questions.

On the first day in the field, the field supervisor listened to the interviewers on an extension monitor. The monitor prevents the interviewer and respondent from knowing they are being listened to. This ensures that the skip and rotation patterns were followed correctly and that there were no questions causing interviewers any particular difficulty. When an error was caught, the interviewer was briefed again and the respondents was called back in order to correct the questionnaire.

1.5.2 MAIL QUESTIONNAIRE

In addition to gathering important information on public opinion toward arts and culture, the general public telephone questionnaire served as a means of accumulating names and addresses of people to whom the longer mail questionnaire could be sent. The principal activities for preparing the mail – out survey included:

- Designing a questionnaire that could be easily self-administered including complete written instructions to accompany the questionnaire;
- Preparing personalized letters that explained the purpose of the survey and solicited participation;
- Assigning an identification number to each questionnaire sent that corresponded to each name on the "control" list"; and
- Assembling the letter, questionnaire, instructions and business-reply envelope in the appropriately labelled envelope.

As each package was prepared for mailing, the identification number/name was checked off on the "control list" and the date of mailing was registered. As the questionnaires were returned, the identification number was used to link the return to the "control list". As the time approached for the reminder card mail follow-up, the "control list" was used to reduce the number of those contacts. Once the questionnaires had been logged in, questionnaires were passed to the coding department for data entry.

In order to encourage response rates both in terms of gathering names and addresses, and in completing the mail questionnaire, an incentive was offered to respondents. The incentive consisted of a draw for a camcorder and ten CD players. Only those respondents from whom we received a completed mail questionnaire were included in the draw.

1.5.3 OVERVIEW OF RESPONSE RATES

The response rates for the mail survey of the general public were greater than expected. The following table illustrates response rates we received across the two Waves of telephone placed-mail surveys. The first column lists the total number of telephone surveys completed. The second column lists the number of respondents who agreed to accept the longer mail questionnaire, and therefore, gave their name and address. The third column describes the total number of completed mail questionnaires we expected to receive, as outlined in the research design. The fourth column lists the actual number of completed surveys received. The final column gives overall response rates of questionnaires back from the initial telephone sample.

Table A.14

COMPLETED SURVEYS BY ZONE

(Wave 1 and Wave 2 combined)

ZONE	COMPLETED TELEPHONE SURVEYS	AGREED TO ACCEPT MAIL QST.	REQUIRED MAIL SURVEY	ACTUAL RECEIVED MAIL SURVEY	OVERALL RESPONSE RATE %
B.C. (LESS VANCOUVER)	900	787	380	452	50
ALBERTA	900	753	380	474	53
SASKATCHEWAN	900	773	380	460	51
MANITOBA	900	774	380	444	49
ONTARIO (LESS TORONTO)	900	750	380	456	51
QUEBÉC (LESS MONTRÉAL)	900	1,166	380	437	49
NEW BRUNSWICK*	1,056	896	380	485	48
ATLANTIC	900	817	380	509	57
VANCOUVER	1,250	1,056	450	593	48
TORONTO	1,250	1,072	450	573	46
MONTRÉAL	1250	1,064	450	569	46
TOTAL	**11,056**	**8,844**	**4,390**	**5,457**	**49**

* Note: The research design specified that a total of 900 telephone surveys would be conducted in New Brunswick. Following a very low response rate from New Brunswick Francophones in Wave I, the decision to conduct an oversample of 156 telephone interviews in French in New Brunswick was made to ensure an adequate number of completed mail surveys in Wave II. Therefore, instead of the total number of telephone surveys being 10,950, as specified in the research design, the total number is, as indicated above 11,106.

1.6 About the Respondents

1.6.1 INTRODUCTION

To begin, let us first address the make-up of the sample of Canadians on which the analysis is based. The research design for the survey of the general population of Canada consisted of a place-mail, telephone survey. That is, a random sample of Canadians were administered a short nine-minute telephone questionnaire, and asked if they would accept a longer mail questionnaire that would be sent to them.

The sample of respondents who completed a mail questionnaire was, therefore, a sub sample of those contacted by telephone.

The method of drawing a random sample of Canadians for the telephone survey of the general public, namely random digit dialling, ensures that the sample is drawn proportionate to population characteristics. That is, the demographic and attitudinal make-up of the sample will reflect that of the overall population. However, there were no controls to ensure that those who complete the mail questionnaire are representative of the larger population.

To further explain, the methodology of a telephone place-mail survey has the potential to build essentially two bias into the data set. Compared with the population overall, there may be a bias in, first, the attitudes of those who agree to accept the longer mail questionnaire and give their name and address to the interviewer, and second, in the attitudes of those who completed the longer mail questionnaire.

However, as will be illustrated, despite the lack of control over who agrees to accept the mail questionnaire, or who completes the mail questionnaire, our results do suggest that a representative sample did respond.

The following tables examine any differences between those who agreed to accept the mail questionnaire, those who did not, and those who completed and returned the mail questionnaire. We will first address the demographics of these groups in terms of their age, education and household income (sections 1.6.2.1 through 1.6.2.3). Following, we will examine any differences between these groups in reported attendance patterns to various types of performances and cultural activities (section 1.6.3).

It should be noted that age and income have been validated from Statistics Canada's data for Canadians who are 15 years of age or older. As well, it should be repeated that the sample is only representative of residents in the provinces who have direct dialling telephone services[1].

While the fact that those who did not choose to participate in the survey were as likely to attend performances, (although, among non-attenders, these were more likely to be those who had less interest in attending performances) does introduce a bias into the sample, this bias is, in fact minimal. The main reason for this is that 80% of those interviewed agreed to accept a mail questionnaire. The bias involves just 20% of the sample.

In order to estimate the size of the bias, the average bias was calculated. This average, that is the percentage difference among non-attenders between those who agreed to accept a mail survey and those who did not, the interest in attending is 10.3% across all items. This ranges from a 16% difference for pop/rock concerts (38%, among those who gave their name and address, say they would not like to have attended, compared with 54% saying this among those who gave their name and address) to a 4% difference when opera performances are considered. The overall impact of 20% of the telephone sample being on average 10.3% more likely to say they would not want to attend a performance, is that *when the entire sample is considered the average bias goes down*

[1] Again, Canadians who are accessible only by a telephone servicing a large number of people, such as senior citizen homes, hospitals and Indian Reserves, and those who have only radio-telephone service or no telephone service at all are automatically excluded from the sample. This, however, represents only a small proportion of the population (less than 5%).

to 2.1% The reason for this is that when the bias is averaged across the entire sample the fact that the bias exits for only one in five respondents reduces the bias five-fold. Even taking the largest difference of 16% on the pop/rock item, once the entire sample is introduced, then the difference between those who agreed to accept a mail questionnaire and those who did not is only 3.3%.

1.6.2 Sample Validation: Demographics

1.6.2.1 Age

The following table examines differences in age between the national average as quoted from Statistics Canada and those respondents who agreed to accept a mail questionnaire and gave their name/address, those who did not give their name/address and those who completed the mail questionnaire (those who completed the mail questionnaire in column 4 are a subset of those who gave their name/address in column 2).

As the table below indicates, the age distribution of those who completed the mail survey closely resembles that of the nation overall. In fact, the only notable variation is that a higher proportion of seniors did not agree to accept the mail questionnaire. The ultimate impact of this, as the table below shows, a somewhat underrepresentation of seniors in the mail sample.

Table A.15

Sample Validation: Age

	NATIONAL AVERAGE *	DID NOT GIVE NAME/ ADDRESS	GAVE NAME/ ADDRESS	COMPLETED MAIL SURVEY
	%	%	%	%
15 to 19 years	8.8	7.8	8.8	7.1
20 - 24 years	9.5	6.4	10.8	9.0
25 - 29 years	11.3	9.2	12.9	11.8
30 - 34 years	11.3	10.6	13.9	14.3
35 - 39 years	10.4	10.3	12.0	12.4
40 - 44 years	9.4	10.6	10.4	11.0
45 - 49 years	7.4	6.8	7.2	7.8
50 - 54 years	6.1	6.4	5.6	5.9
55 - 59 years	5.8	6.6	4.6	5.3
60 - 64 years	5.5	5.8	4.7	5.0
65 years and over	14.5	19.3	8.9	10.3

* Source: Statistics Canada 1991

1.6.2.2 Educational Attainment

The educational attainment of respondents is compared with the national average in the table below. The categories and wording of the education item on the questionnaire were not perfectly compatible with the break down provided by Statistics Canada. The education item on the questionnaire allowed for a "student" category. For the purposes of comparison, those who indicated they were students were excluded, and remaining categories re-calculated.

Most notably, the university educated, and those whose highest level of education is a high school diploma are overrepresented in the sample that completed the mail surveys. Those with a public/elementary school background, those who have attended but did not complete high school, and those who have a post secondary certificate or diploma are underrepresented. The higher than average level of education is typical for a telephone survey. The most likely explanation is that some respondents inflate their level of education.

Table A.16

Sample Validation: Education

	NATIONAL AVERAGE *	GAVE NAME/ ADDRESS	DID NOT GIVE NAME/ ADDRESS	COMPLETED MAIL SURVEY
	%	%	%	%
HIGHEST LEVEL OF EDUCATION				
Public/elementary school	14.4	4.2	7.9	3.0
Some high school	22.9	15.3	20.8	14.8
Graduated high school	20.9	26.6	32.8	26.6
Post secondary certificate	21.9	16.4	16.8	7.7
University educated	11.2	24.0	21.7	18.9

* Source: Statistics Canada 1990

1.6.2.3 Household Income

With the exception of the upscale, that is those whose household income is $75,000 or more, the income distribution of respondents from the mail survey resembles that of the national average. In addition, there does not appear to be significant variation in the distribution of household income between those who agreed to accept the mail survey, and those who did not.

Table A.17

Sample Validation: Income

	NATIONAL AVERAGE *	GAVE NAME/ ADDRESS	DID NOT GIVE NAME/ ADDRESS	COMPLETED MAIL SURVEY
	%	%	%	%
Less than $10,000	2.6	7.1	9.0	6.7
$10,000 - $14,000	4.1	6.8	8.3	6.4
$15,000 - $19,999	6.7	7.4	8.9	7.2
$20,000 - $24,999	7.0	9.1	9.4	8.8
$25,000 - $29,999	6.4	9.1	7.6	9.2
$30,000 - $34,999	7.2	8.1	7.1	8.3
$35,000 - $39,999	7.1	8.0	9.2	8.4
$40,000 - $44,999	7.4	10.0	10.8	10.0
$45,000 - $49,999	7.0	7.4	6.3	7.5
$50,000 - $54,999	6.8	6.1	4.8	6.1
$55,000 - $59,999	6.0	4.8	3.2	4.9
$60,000 - $64,999	5.2	3.7	3.9	4.1
$65,000 - $69,999	4.5	2.1	1.9	2.3
$70,000 - $74,999	3.9	1.7	1.8	1.6
$75,000 and over	18.1	8.6	7.9	8.4

* Source: Statistics Canada 1990

1.6.3 SAMPLE VALIDATION: ATTENDANCE

To further explore the make-up of the sample, data collected from the telephone portion of the surveys regarding reported attendance in the past year to a variety of types of performances and cultural activities are presented, in comparison form, in the table below. Similar to the tables exploring the age, educational attainment and household income composition of the samples, the table compares results gathered from those who agreed to accept the mail questionnaire, those who did not agree to accept the mail questionnaire, and those who completed the mail survey.

There does not appear to be significant variations in overall attendance at performances or cultural activities between the telephone sample and the returned mail sample. Where variations do occur, it is in the interest in attending. As illustrated in Table A.18, those who did not agree to accept the mail questionnaire, and therefore did not give their name or address, are notably more likely to say they "would not like to attend" the performance or cultural activity. This holds true for each of the performances and activities listed. The implication of this is that the sample collected from the mail survey underrepresents those with minimal, if any, interest in attending these performances and activities.

Table A.18

Sample Validation: Attendance

	GAVE NAME AND ADDRESS*	DID NOT GIVE NAME AND ADDRESS*	COMPLETED THE MAIL SURVEY
Results from telephone survey by those who attended...	%	%	%
Pop/rock concert	27	19	26
Would like to attend	35	27	35
Would not like to attend	38	54	39
Jazz/blues concert	13	11	13
Would like to attend	34	25	34
Would not like to attend	52	64	53
Country/western concert	12	11	11
Would like to attend	34	32	34
Would not like to attend	54	57	55
Children's play	15	11	15
Would like to attend	34	27	33
Would not like to attend	50	61	51
Classical music concert	15	14	16
Would like to attend	36	27	36
Would not like to attend	49	59	48
Opera	6	7	6
Would like to attend	28	24	29
Would not like to attend	65	69	64
Ethnic music/dance performance	16	16	16
Would like to attend	42	53	43
Would not like to attend	42	54	41
Ballet	8	7	8
Would like to attend	35	28	35
Would not like to attend	58	65	57
Modern dance performance	9	9	8
Would like to attend	42	34	42
Would not like to attend	49	58	49
Musical	20	18	20
Would like to attend	51	43	53
Would not like to attend	29	38	26
Play in a theatre	30	24	31
Would like to attend	50	42	50
Would not like to attend	20	34	18
Sports event	48	40	47
Would like to attend	26	26	26
Would not like to attend	25	33	27
Movie in a theatre	62	51	61
Would like to attend	20	19	20
Would not like to attend	17	30	18
Art gallery	30	25	32
Would like to attend	38	29	39
Would not like to attend	32	45	29
Museum	38	32	40
Would like to attend	42	34	42
Would not like to attend	19	33	17

1.6.4 SAMPLE FRAME AND CONFIDENCE INTERVALS

The sample frame initially agreed to for the general public survey is shown in the following tables (A.19.1, A.19.2, A.19.3). Because of the concern with ensuring an adequate number of completed mail surveys, a stratified sample was undertaken, such that the rural areas and small communities were overrepresented in the sample. This means that in order to generalize to each zone and the Canadian population overall, each zone had been weighted to compensate for the oversampling. The exceptions are the three cities where no stratification was required.

Table A.19.1

Profile of Canadian Art Consumer
Sampling Frame : General Public Survey

	Atlantic (- N.B.)				New Brunswick				Québec (- Montréal)				Ontario (- Toronto)			
Telephone Interview																
Community Size	%	N1	N2	N3	%	N1	N2	N3	%	N1	N2	N3	%	N1	N2	N3
100 000 or more	37%	333	500	157	31%	279	500	141	33%	297	500	153	53%	477	500	408
10 000 to 99 999	16%	144	200	68	20%	180	200	82	24%	216	200	112	21%	189	200	162
Less than 10 000	47%	423	200	200	49%	441	200	200	43%	387	200	200	26%	234	200	200
Total	100%	900	900	425	100%	900	900	423	100%	900	900	465	100%	900	900	770
95% confidence level	----	3.30%	----	4.80%	----	3.30%	----	4.80%	----	3.30%	----	4.61%	----	3.30%	----	3.55%
Second official language	----	----	----	----	31%	275	275	----	5%	50	50	----	8	75	75	----
Non-European Origin	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----
Mailed questionnaires																
Community Size	%	N1	N2	N3	%	N1	N2	N3	%	N1	N2	N3	%	N1	N2	N3
100 000 or more	37%	141	212	66	31%	118	212	53	33%	125	212	64	53%	201	212	171
10 000 to 99 999	16%	61	84	29	20%	76	84	34	24%	91	84	47	21%	80	84	84
Less than 10 000	47%	178	84	84	49%	186	84	84	43%	164	84	84	26%	99	84	84
Total	100%	380	380	179	100%	380	380	171	100%	380	380	195	100%	380	380	339
95% confidence level	----	5.15%	----	7.30%	----	5.15%	----	7.35%	----	5.15%	----	6.95%	----	5.15%	----	5.38%
Second official language	----	----	----	----	31	120	120	----	5	20	20	----	----	20	20	----
Non-European Origin	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----

Key to columns : % is the percentage of the population living in each size of community indicated
N1 is the proportionnal distribution of the population based on a random sample
N2 is the distribution of the population based on quotas, to ensure a significantly large urban sample
N3 indicates the weighted sample if quotas are followed (N2)

Table A.19.2

Profile of Canadian Art Consumer
Sampling Frame : General Public Survey

	Manitoba				Saskatchewan				Alberta				British Columbia			
Telephone Interview																
Community Size	%	N1	N2	N3	%	N1	N2	N3	%	N1	N2	N3	%	N1	N2	N3
100 000 or more	59%	531	600	337	38%	342	500	178	61%	549	600	435	17%	153	400	96
10 000 to 99 999	6%	54	100	34	13%	117	200	53	11%	99	100	78	53%	477	300	300
Less than 10 000	35%	315	200	200	49%	441	200	200	28%	252	200	200	30%	270	200	170
Total	100%	900	900	571	100%	900	900	429	100%	900	900	713	100%	900	900	566
95% confidence level	....	3.30%	....	4.20%	....	3.30%	....	4.80%	....	3.30%	....	3.70%	....	3.30%	....	4.15%
Second official language	5	50	50	....	....	....	....	....	....	....	....	....	....	....	....	....
Non-European Origin	....	....	....	....	....	....	....	....	....	....	....	....	....	....	....	....
Mailed questionnaires																
Community Size	%	N1	N2	N3	%	N1	N2	N3	%	N1	N2	N3	%	N1	N2	N3
100 000 or more	59%	224	253	134	38%	145	212	59	61%	232	253	183	17%	65	169	48
10 000 to 99 999	6%	23	43	10	13%	49	84	22	11%	42	43	33	53%	201	127	148
Less than 10 000	35%	133	84	84	49%	186	84	84	28%	106	84	84	30%	114	84	84
Total	100%	380	380	228	100%	380	380	165	100%	380	380	300	100%	380	380	280
95% confidence level	....	5.15%	....	6.60%	....	5.15%	....	7.40%	....	5.72%	....	5.35%	....	5.65%	....	5.95%
Second official language	5	20	20	....	....	....	....	....	....	....	....	....	....	....	....	....
Non-European Origin	....	....	....	....	....	....	....	....	....	....	....	....	....	....	....	....

Key to columns : % is the percentage of the population living in each size of community indicated
N1 is the proportionnal distribution of the population based on a random sample
N2 is the distribution of the population based on quotas, to ensure a significantly large urban sample
N3 indicates the weighted sample if quotas are followed (N2)

Table A.19.3

Profile of Canadian Art Consumer
Sampling Frame : General Public Survey

	Montréal		Toronto		Vancouver		COMBINED TOTAL OF ALL 11 AREAS
Telephone Interview							
Community Size	%	N1	%	N1	%	N1	
100 000 or more	----	1250	----	1250	----	1250	
10 000 to 99 999	----	----	----	----	----	----	
Less than 10 000	----	----	----	----	----	----	
Total	----	1250	----	1250	----	1250	10950
95% confidence level	----	2.80%	----	2.80%	----	2.80%	
Second official language	32%	400	----	----	----	----	800
Non-European Origin	10%	125	20%	250	20%	250	625
Mailed questionnaires							
Community Size	%	N1	%	N1	%	N1	
	----	450	----	450	----	450	
100 000 or more	----	----	----	----	----	----	
10 000 to 99 999	----	----	----	----	----	----	
Less than 10 000							
	----	450	----	450	----	450	4390
Total							
	----	4.67%	----	4.67%	----	4.67%	
95% confidence level							
	32%	150	----	----	----	----	310
Second official language	10%	50	20%	100	20%	100	250
Non-European Origin							

Key to columns : % is the percentage of the population living in each size of community indicated
N1 is the proportionnal distribution of the population based on a random sample
N2 is the distribution of the population based on quotas, to ensure a significantly large urban sample
N3 indicates the weighted sample if quotas are followed (N2)

The fact that targets were exceeded in each zone means that a slightly larger sample size formed the basis for the weighting, and this means that the final weighted sample for each zone is larger than was initially proposed. The number of completed mail interviews received for each zone and the final weighted sample are shown in Table A.20 together with the confidence interval at the 95% level.

Table A.20

	UNWEIGHTED	WEIGHTED	CONFIDENCE INTERVAL
	n	n	±%
B.C. (LESS VANCOUVER)	452	268	4.7
ALBERTA	474	336	4.6
SASKATCHEWAN	460	216	4.7
MANITOBA	444	264	4.8
ONTARIO (LESS TORONTO)	456	423	4.7
QUÉBEC (LESS MONTRÉAL)	437	246	4.8
NEW BRUNSWICK	485	258	4.6
ATLANTIC	509	255	4.4
VANCOUVER	598	598	4.1
TORONTO	573	573	4.2
MONTRÉAL	569	569	4.2
TOTAL	5,457	1,705	2.4

1.6.5 CODING

The questionnaires were coded and the data entered by experienced Decima personnel. The following standard procedures were followed:

- An initial briefing;
- Supervision of trained staff; and
- Verification of 15% of each coder's work.

Decima's internal coding involved several steps including coder briefing, interview check-in and sorting, and closed-ended questionnaire check-out to data processing. A detailed set of illustrative instructions were prepared and an extensive question-by-question briefing was held by the research analyst and coding supervisor.

1.7 Data Processing

The entry and processing of the general public data were carried out on-site using Decima's VAX computer. Decima's interactive software system, designed specifically for survey analysis, has a robust data entry facility which permits cleaning of the data, including out-of-range values and skip-pattern errors, as well as other logic errors. We used a key-to-disk technique under software control. This software was custom designed by Decima for the business of survey data entry and is a robust, thorough system that ensures capture of high-quality data.

The data from the performing and visual arts questionnaires were entered, under Decima's supervision, by an outside supplier (InfoQualiData). The data were then transferred to Decima's computer system, coded, then processed and analysed.

At the data processing stage of the project, the completed mail survey was "married" with its corresponding completed telephone questionnaire, based on identification numbers. This produced a "merged" data set of telephone and mail questionnaires. Data from those telephone respondents who did not accept a mail questionnaire, or did not complete one, were not included in the merged data.

The fully cleaned data were summarized into aggregate tables. The mean, median and standard error of each frequency distribution are also reported where appropriate. A "mean only" capability was available for numerical data where only the average is of concern.

In addition to reporting the data from the questionnaires in aggregate form, numerous new variables, as discussed below, were created.

Further analysis of the data included cross-tabulation tables, measures of association, factor analysis, and cluster analysis. While the most sophisticated procedures have been used to collect and analyse the information presented herein, it must be remembered that surveys are not predictions. They are designed to measure public opinion within identifiable statistical limits of accuracy at specific points in time. This survey is in no way a prediction of opinion or behaviour at any future point in time.

Distinct from the three other sets of data, the performing arts facility and performance inventory, the audience data, as well as the visual arts intermediary data were entered, processed and tables produced on Cultur'inc inc.'s computer system, using Macintosh computers and an Omnis 5 custom designed relational database.

1.8 Summary of Valid Questionnaires Completed

The data sets used for the analysis comprised the following numbers of questionnaires. The table also presents the goals and the percentage of attainment of such goals.

The total number of valid questionnaires received was: 5,650 Festival Short Questionnaires, 33,978 Performing Arts Short Questionnaires, 7,358 Performing Arts Long Questionnaires, 1,672 Visual Arts Long Questionnaires, 11,106 General Public Telephone Questionnaires, and 5,457 General Public Long Questionnaires.

Table A.21

Valid Questionnaires Completed

1991 ZONE	FSQ	PASQ	PALQ	VALQ[1]	GPTQ	GPLQ
B.C. less Vancouver	212	2,921	560	111	900	452
Alberta	509	3,499	703	201	900	474
Saskatchewan	449	1,969	455	84	900	460
Manitoba	201	2,363	478	38	900	444
Ontario less Toronto	1,249	4,619	1,162	238	900	456
Québec less Montréal	553	3,680	646	95	900	437
New Brunswick	518	1,667	440	107	1,056	485
Atlantic	115	2,404	504	99	900	509
Vancouver	1,027	2,465	609	220	1,250	598
Toronto	302	4,695	1,012	259	1,250	573
Montréal	515	3,696	789	220	1,250	569
Total for analysis	5,650	33,978 39,628[2]	7,358	1,672	11,106	5,457
Design objective	n/a	26,600	8,867	2,000	10,950	4,390
% to design	n/a	149%	83%	84%	101%	124%

LEGEND:
- FSQ: Festivals Short Questionnaire
- PASQ: Performing Arts Short Questionnaire
- PALQ: Performing Arts Long Questionnaire
- VALQ: Visual Arts Long Questionnaire
- GPTQ: General Public Telephone Questionnaire
- GPLQ: General Public Long Questionnaire

1 Relates respondents to the zone of point of sale. Respondents' zone of residence vary somewhat.

2 Total number of performing arts short questionnaires gathered including festival.

Appendix 2

Resources

CULTUR'INC PROFILE TEAM

François Arcand	CEO **Project Director** **Report Co-Author** •Conceptual Design •Analysis
Stéphanie Brody	•Analysis •Translation
Pierre Bourdon	•Advisor
Robert Séguin	•Initial research, survey concept and visual arts intermediaries
Nicole Lemire	•Initial research, survey concept

Field Team, Performing and Visual Arts Surveys

Marie Duclos	**Project Manager** •Project coordination and budget control •Final report production coordination (translation, revision, etc.)
Jeannie Walker	**Project Field Coordinator** •Data processing, performing and visual arts collections •Analysis •Revision
Karen Angle Alain Reiher Erik Tiré	•Facility contact, coordination of on-site personnel, preparation and assembly of collection questionnaires, performing arts short questionnaire validation
François Guignard	•Inventory research, performing and visual arts
Yvette Barrière	•Performing and visual arts long questionnaire validation and processing
Marie-Josée Ouimet	•Documentation preparation for mailing, visual arts

Support Team

Francine Blanchard	•**Final Report Layout** •Wordprocessing
Violaine Tremblay	•Copy Editor
Lou Nelson	•Translation
Olivier Phaneuf	•Translation
Jean Deschênes	•Translation, Copy Editor
Marie-Josée Arcand	•Translation
Nathalie Tremblay	•Wordprocessing
Danielle Blain	•Project contract coordination

Outside Suppliers

McGilly Computer Consultants	•Performing and visual arts software development, field data retrieval and processing
Richard McGilly	•Software design and analysis
Luc Poirier	•Software programming, facility and presentation database
Italique	•Questionnaires layout, performing and visual arts

DECIMA RESEARCH PROFILE TEAM

Michael Sullivan	Senior Vice President **Project Director** **Report Co-Author** •Conceptual Design •Analysis
Stephanie Speal	•**Analysis**

Field Team, General Public Survey

Dan Baril	•**Operations**
Russ Wilton	•**Systems Management**
Miriam Essau	•Data Processing Coordinator
Don Bowry	•Operator
Allan Eng	•Operator
Mark Finstad	•Production & Printing
Nancy Murillo	•Field and Coding
Oscar Fernandes	•Phone Centres
Kim Sweeney	•Coding and Data Entry Supervisor
Mike Maloney	•Sampling

Support Team

Shamim Husein	•**Wordprocessing**
Kelly Smith	•Electronic Transmissions
Josée Lavoie	•Translation

Outside Supplier

InfoQualiData	•Data Entry, performing and visual arts

COMMUNICATIONS CANADA PROFILE TEAM

Gaston Blais	Director General Arts and Policy Planning
Ronald Holgerson	National Coordinator Editor-in-Chief
Daniel Giasson Geneviève Ledoux	Intergovernmental Relations
Judy Wilkinson	Client Relations, Cover Design
Bernadette Chacron	Financial and Contractual Administration
Anne Séguin France Trépanier Denise Séguin	Special Assistance
Michelle Morisset Jeanne Lindblad Lucie Deblois	Information Services
Marie-Claude Simard Richard Ouellet	Legal Services
Helen MacDonald Brian Evans	Program Evaluation
Francine Anglehart Catherine Ruddy	Wordprocessing/Secretarial Services
Joanne Binette	Mailing List

OUTSIDE SERVICES

Nicole Fairfield	Contract Services Canada Communications Group
Ian McKellar	Statistics Canada Research Design Consultant
Ken Desson	Communications Plan

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Peggy Walt	Government of Nova Scotia
Michelle Messier	Government of Quebec
Alex Sales	City of Vancouver

NOTES

NOTES

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Department of Municipalities, Culture
and Housing
New Brunswick

Department of Tourism and Culture
Nova Scotia

Department of Community and Cultural
Affairs
Prince Edward Island

Department of Municipal and Provincial
Affairs
Newfoundland and Labrador

City of Vancouver

City of Toronto

City of Montreal